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ABSTRACT

The document is comprised of the appendixes to Volume 3 ("Descriptive Study of the Talent Search Program") of a four-volume Research Triangle Institute final report titled, "A Study of the National Upward Bound and Talent Search Programs." The 14 appendixes comprising the document are: a list of Talent Search advisory council members, analysis advisory committee members, and other consultants; OE Form 1231, in which Talent Search project directors indicate client population, project accomplishments, and financial assistance information; DHEW regional boundaries and headquarters; materials related to sampling methodology and sampling error computation and data collection and processing procedures; Talent Search site-visit protocol; the Talent Search project director questionnaire; the Talent Search counselor questionnaire; the Talent Search client educational form; materials concerning participant eligibility and program legislation for TRIO programs; a form sent to project directors for listing clients who began studies at a postsecondary institution between July 1 and December 31, 1973; a form sent to registrars of postsecondary institutions to verify enrollment status of former Talent Search clients; and OE Form 1227, a quarterly financial report for special programs. (Author/AJ)

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CENTER FOR EDUCATIONAL RESEARCH AND EVALUATION

Project No. 22U-889

December 1975

Final Report

A STUDY OF THE
NATIONAL UPWARD BOUND AND TALENT SEARCH PROGRAMS

ED121995

Appendixes to Volume III

DESCRIPTIVE STUDY OF THE TALENT SEARCH PROGRAM

by
J. N. Pyecha, Project Director
Jane W. Bergsten
Roderick A. Ironside
Cynthia A. Kenyon
David H. Stuart
Lucia A. Ward

Prepared for
Office of Planning, Budgeting, and Evaluation
U.S. Office of Education
under
Contract No. OEC-0-73-7052

U S DEPARTMENT OF HEALTH
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

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FINAL REPORT

22U-889

A STUDY OF THE NATIONAL UPWARD BOUND AND TALENT SEARCH PROGRAMS

APPENDIXES TO VOLUME III

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The research reported herein was performed pursuant to a contract with the Office of Education, U. S. Department of Health, Education, and Welfare. Contractors undertaking such projects under government sponsorship are encouraged to express freely their professional judgement in the conduct of the project. Points of view and opinions stated do not, therefore, necessarily represent official Office of Education position or policy.

PREFACE

A Study of the National Upward Bound and Talent Search Programs, the final report of the research conducted by the Research Triangle Institute (RTI) under USOE contract number OEC-0-73-7052, is presented in four volumes:

Volume I, Review of the Literature Relevant to Upward Bound and Talent Search Programs.

Volume II, Estimates of the Target Population for the Upward Bound and Talent Search Programs.

Volume III, Descriptive Study of the Talent Search Program.

Volume IV, Evaluation Study of the Upward Bound Program.

This document contains the appendixes to Volume III (Descriptive Study of the Talent Search Program) of the four-volume RTI report.

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Appendix A

List of Advisory Council Members, Analysis Advisory Committee Members, and Other Consultants

The Advisory Council

For those members of the Advisory Council who have changed positions since their appointment to the Council in August 1973, the positions they held at the time of their appointment is in parenthesis.

Dr. David Ballesteros, Dean, School of Arts and Sciences, Sacramento State College.

Mr. Marcus Bell, Moton College Service Bureau (formerly with the Special Programs Branch, USOE).

Dr. Robert Berls, Office of Planning, Budgeting, and Evaluation, USOE.

Ms. Lois J. Carson, Project Director, Upward Bound, University of California at Riverside.

Mr. Alan Clarke, Executive Director of Bridge Fund, Inc.

Dr. Sal Corrallo, Office of Planning, Budgeting, and Evaluation, USOE.

Mr. David Johnson, Division of Student Support and Special Programs, USOE.

Dr. John Rison Jones, Division of Student Support and Special Programs, USOE.

Ms. Rosalia Martinez, Director, Talent Search, Aspira.

Mr. Walter Mason, Affirmative Action Officer, University of Oklahoma (former Senior Student Special Services Program Officer, Dallas Regional Office of Education).

Mr. Grayson Noley, Pennsylvania State University (former Project Director, Upward Bound, University of Oklahoma).

Mr. Alexis Poliakoff, Special Programs Branch, USOE.

Mr. Silas Purnell, Project Director, Talent Search, Ada S. McKenly Community Service.

Ms. Janis Sanchez-Hucles, (Student, University of North Carolina at Chapel Hill).

Mr. Frank Sandage, Indiana University (former Instructional Coordinator, Trio Program, Morehead State University).

Ms. Faith Spotted Eagle (Student, University of South Dakota).

Mr. Rudy Tamez, Project Director, Upward Bound, St. Mary University.

Dr. Stephen J. Wright, Vice President, College Entrance Examination Board.

The Analysis Advisory Committee

This committee was convened by OPBE (USOE) for a two-day meeting in December 1974 to review the data analysis plans for the study.

Dr. Albert E. Beaton, Educational Testing Service.
Dr. R. Gary Bridge, Teachers College, Columbia University.
Dr. Charles L. Thomas, Indiana University.
Dr. Vincent Tinto, Syracuse University.

Other Consultants

Name	Title	Contribution
Mr. Fred Sedorchuk	UB Management Information System, DSA, USOE	Availability of data in UBMIS
Dr. Joseph Battle	Professor of Business Administration, Duke University	Participated in all phases of study planning and in site visits to selected UB and ETS projects
Ms. Anne Borders-Patterson	Graduate Student, Sociology University of North Carolina	Instrument Development
Dr. Duane Brown	Associate Professor of Education, University of North Carolina	Project and School Counselor Questionnaire Development
Mr. David Clayborne	Dean of Minority Affairs Duke University	General design consideration and instrument development
Mr. James Chavis	ETS Project Director Pembroke, N.C.	Advise on ETS project operation and availability of records
Mr. Donald Armstrong	ETS Project Director Rocky Mount, N.C.	Advise on ETS project operation and availability of records

Appendix B

OE Form 1231

DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE
OFFICE OF EDUCATION
WASHINGTON, D.C. 20202

EDUCATIONAL TALENT SEARCH PROGRAM

STATISTICAL REPORT

1973-74

PROJECT NUMBER ☐☐☐☐☐☐

O.M.B. NO. 51-R0886
APPROVAL EXPIRES: 7/31/74

REPORT PERIOD *(check one)*

☐ INTERIM JULY 1, 1973-DEC.31,1973

☐ FINAL JULY 1, 1973- JUNE 30, 1974

INSTRUCTIONS

This report is to be completed by ALL Project Directors. The period of time for the report is indicated above. The first report is an INTERIM report and covers the period from July 1, 1973 to December 31, 1973. The second is a FINAL report and covers the period from July 1, 1973 to June 30, 1974. The FINAL report must reflect client population, project accomplishments and financial assistance information for the entire project year.

Read instructions with each item carefully. Prepare an original and two copies. Retain one copy for your records. Send the second copy to your Regional Special Services Program Officer (list attached). Forward the ORIGINAL to:

U.S. OFFICE OF EDUCATION/BHE
DIVISION OF STUDENT ASSISTANCE/DCAB
ROOM 4310, ROB
WASHINGTON, D.C. 20202

CLIENT. An individual who has received two or more personal contacts of sustained counsel by the project director or his representative during the report period.

SECTION I – PROJECT IDENTIFICATION

A. PROJECT NAME	B. PROJECT ADDRESS *(number, street, city, State, and ZIP code)*		
C. NAME OF PROJECT DIRECTOR	D. PROJECT TELEPHONE	AREA CODE	NUMBER
E. GRANTEE NAME *(if different from project)*	F. GRANTEE ADDRESS *(number, street, city, State and ZIP code)*		
G. AUTHORIZED OFFICIAL *(person authorized to commit institutional resources)*	H. GRANTEE TELEPHONE	AREA CODE	NUMBER

SECTION II – CLIENT INFORMATION

A. TOTAL NUMBER OF CLIENTS WHO HAVE BEEN ASSISTED DURING REPORT PERIOD. TOTALS IN HEAVILY OUTLINED AREAS MUST AGREE *(select appropriate report period)*	NUMBER OF CLIENTS
REPORT PERIOD	
1. INTERIM: JULY 1, 1973 TO DECEMBER 31, 1973	
2. FINAL JULY 1, 1973 TO JUNE 30, 1974	

B. CLIENT ELIGIBILITY *(count clients once) (number of clients accepted into project on basis of following criteria)*	NUMBER OF CLIENTS
1. LOW FAMILY INCOME AND RELATED CRITERIA *(see Program Manual, Appendix A)*	
2. CULTURAL OR GEOGRAPHIC ISOLATION	
3. OTHER	
4. *TOTAL (sum of lines 1, 2, and 3)*	

C. CLIENT DISTRIBUTION BY INCOME AND ETHNO-RACIAL BACKGROUND *(count clients once)*

ANNUAL INCOME*	BLACK	AMERICAN INDIAN	ORIENTAL	SPANISH DESCENT			WHITE *(other than Spanish descent)*	OTHER	TOTAL
				MEXICAN	PUERTO RICAN	OTHER			
1. $0 - $2,999									
2. $3,000 - $5,999									
3. $6,000 - $7,499									
4. $7,500 - $8,999									
5. $9,000 OR MORE									
6. *GRAND TOTAL (sum of lines 1-5)*									
NUMBER OF:									
7. MALE									
8. FEMALE									

**Annual income of family or individual, if self-supporting.*

OE FORM 1231, 9/72 PREVIOUS EDITIONS OF THIS FORM ARE OBSOLETE.

SECTION III – BACKGROUND AND EDUCATIONAL STATUS OF CLIENTS

A. NUMBER OF CLIENTS WHO ARE: *(clients may be counted more than once)*	NUMBER	B. NUMBER OF CLIENTS BY TYPE OF FAMILY RESIDENCE: *(count clients once)*	NUMBER
1. VETERANS		1. FARM	
2. LIVING IN MODEL CITIES		2. NON-FARM	
3. FROM MIGRANT FAMILIES		3. INDIAN RESERVATION	

C. CLIENTS' EDUCATIONAL STATUS AT TIME OF INITIAL CONTACT *(count clients once)*			NUMBER
1. NOT ENROLLED ANYWHERE BECAUSE CLIENT:	NUMBER	3. REGULARLY ENROLLED IN GRADES 9 THROUGH 12	
a. Graduated from secondary school		4. ENROLLED IN HIGH SCHOOL EQUIVALENCY PROGRAM	
b. Dropped out in grade 8 or below		5. ENROLLED IN G.E.D. PROGRAM	
c. Dropped out in grades 9 through 12		6. ENROLLED IN ADULT BASIC EDUCATION PROGRAM	
d. Dropped out of post-secondary school		7. OTHER *(specify)*	
2. REGULARLY ENROLLED IN GRADES 7 AND 8		8. *TOTAL (must agree with totals in Section II) (sum of lines 1 through 7)*	

SECTION IV – PROJECT ACCOMPLISHMENTS

THE FIRST REPORT *(July 1, 1973 through December 31, 1973)* IS AN INTERIM REPORT REFLECTING ACTIVITY TO DATE. THE SECOND REPORT *(July 1, 1973 through June 30, 1974)* IS THE FINAL REPORT FOR THE ENTIRE YEAR AND MUST COVER ALL ACCOMPLISHMENTS FOR THAT YEAR. NO TOTALS ARE REQUESTED. CLIENTS MAY BE COUNTED IN EITHER SUBSECTION A OR SUBSECTION B BUT NOT IN BOTH. CLIENTS COUNTED IN A OR B MAY BE COUNTED IN C AND D, IF APPROPRIATE.

A. POST-SECONDARY PLACEMENT *(count clients once, do not include those in B)*	
1. NUMBER OF CLIENTS WHO BEGAN STUDIES AT A POST-SECONDARY INSTITUTION SINCE JULY 1, 1973 *(you may also count last year's "clients" who began their studies since July 1, 1973)*	
2. NUMBER OF CLIENTS ACCEPTED BY ONE OR MORE POST-SECONDARY INSTITUTIONS SINCE JULY 1, 1973, WHO HAVE NOT YET BEGUN THEIR STUDIES	
3. NUMBER OF CLIENTS WHO SUBMITTED ONE OR MORE POST-SECONDARY APPLICATIONS SINCE JULY 1, 1973, BUT RECEIVED ONLY NEGATIVE RESPONSES *(you may wish to explain under Section VI A)*	
B. OTHER EDUCATION AND TRAINING ACTIVITIES *(count clients once, do not include those in A above)*	
1. NUMBER ASSISTED IN ENTERING ACTION *(Job Corps, Peace Corps, VISTA)*, MANPOWER, OR OTHER ON–THE–JOB TRAINING PROGRAMS	
2. NUMBER ASSISTED IN ENTERING ARMED FORCES TRAINING PROGRAMS	
C. DROP-OUT PREVENTION AND RETURN *(clients may also appear in A or B and D)*	
1. NUMBER OF DROP-OUTS RETURNED TO ELEMENTARY SCHOOL *(grade 8 or below)*	
2. NUMBER OF DROP-OUTS RETURNED TO SECONDARY SCHOOL *(grades 9 through 12)*	
3. NUMBER OF DROP-OUTS RETURNED TO POST-SECONDARY SCHOOL	
4. NUMBER OF DROP-OUTS PLACED IN HIGH SCHOOL EQUIVALENCY PROGRAMS	
5. NUMBER OF DROP-OUTS PLACED IN G.E.D. PROGRAM	
6. NUMBER OF DROP-OUTS PLACED IN ADULT BASIC EDUCATION PROGRAM	
7. NUMBER OF STUDENTS PREVENTED FROM DROPPING OUT AT ALL LEVELS	
D. PLACEMENT IN OTHER TRIO PROGRAMS *(clients may also appear in A or B and C above)*	
1. NUMBER OF CLIENTS PLACED IN UPWARD BOUND PROJECTS	
2. NUMBER OF CLIENTS PLACED IN SPECIAL SERVICES PROJECTS	

SECTION V – ADEQUACY OF POST-SECONDARY FINANCIAL ASSISTANCE	PROJECT NUMBER

REPORT CLIENTS WHO HAVE RECEIVED POST-SECONDARY ACCEPTANCE SINCE JULY 1, 1973 FOR WHOM YOU HAVE FIRM FINANCIAL DATA. REPORT ALSO THOSE WHO BEGAN POST-SECONDARY EDUCATION SINCE JULY 1, 1973, BUT WERE ACCEPTED PRIOR TO THAT DATE IF FIRM FINANCIAL DATA WAS NOT PREVIOUSLY AVAILABLE. COUNT EACH CLIENT OR FORMER CLIENT ONCE.

A. NUMBER WHO RECEIVED ADEQUATE FINANCIAL SUPPORT* *"*Adequate financial support" is defined as sufficient funds to meet the EDUCATIONAL needs of the student. Such support may encompass tuition, board and room, commuting, books and supplies, fees and/or other costs directly related to education.*	
B. NUMBER WHO RECEIVED ADEQUATE FINANCIAL SUPPORT FOR EDUCATION BUT WERE UNABLE TO ACCEPT FOR PERSONAL, NON-EDUCATIONAL, FINANCIAL REASONS	
C. NUMBER OFFERED FINANCIAL SUPPORT WHICH WAS INSUFFICIENT FOR EDUCATIONAL NEEDS *(you may wish to explain in Section VI A below)*	
D. NUMBER REJECTED FOR FINANCIAL SUPPORT *(you may wish to explain in Section VI A below)*	

SECTION VI – ADDITIONAL INFORMATION AND SIGNATURE

A. ADDITIONAL INFORMATION *(reference item by giving section, letter and number) (you may also wish to report items of significant information which could be useful to other projects or which need to be brought to the attention of higher authorities)* IF ADDITIONAL SPACE IS NECESSARY, CONTINUE ON REVERSE SIDE

B. I CERTIFY THE ABOVE INFORMATION IS ACCURATE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.

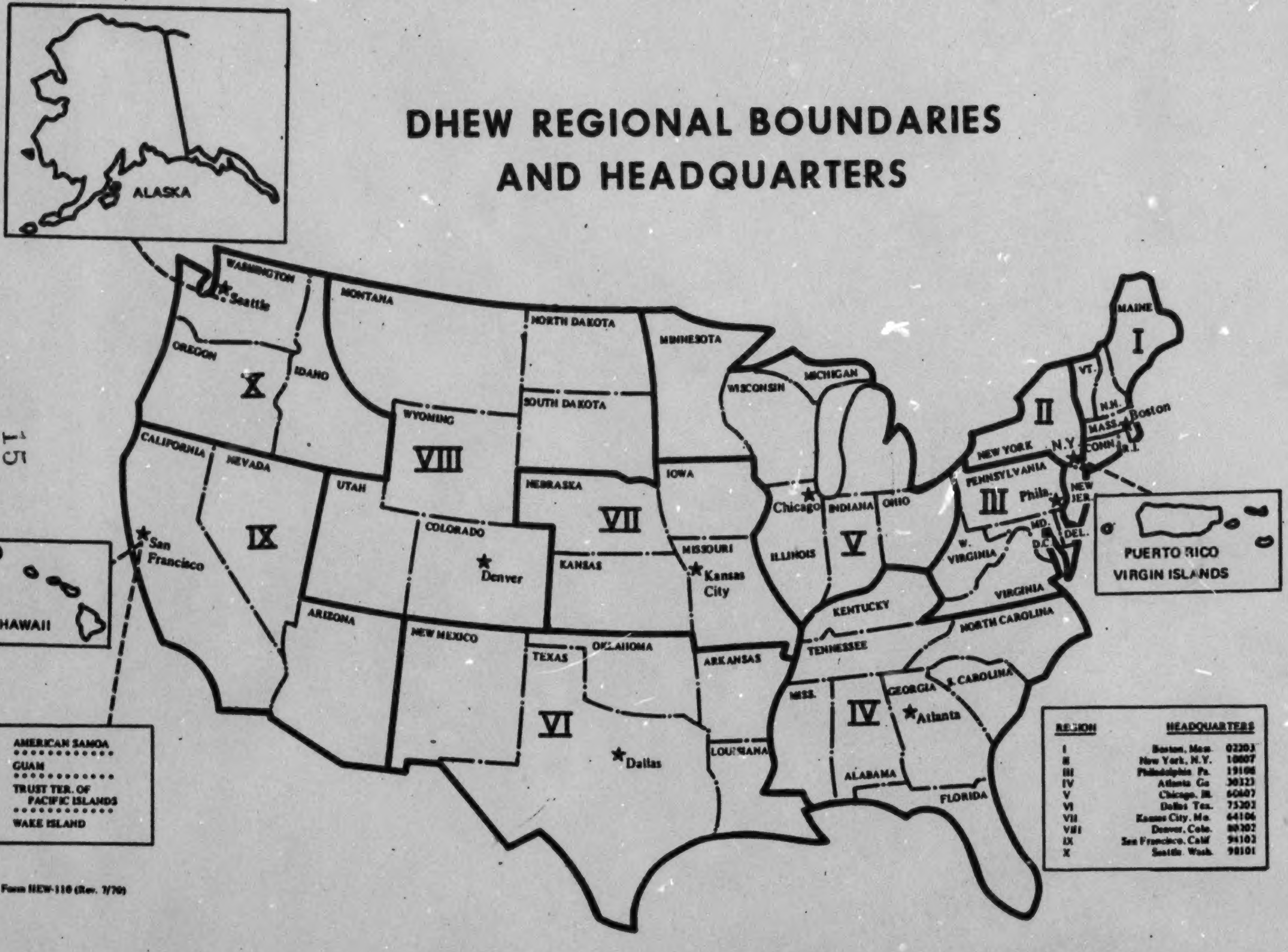
SIGNATURE OF PROJECT DIRECTOR	TYPED NAME OF PROJECT DIRECTOR
NAME OF PROJECT	DATE

GSA DC 73-13926

Appendix C

DHEW Regional Boundaries and Headquarters

DHEW REGIONAL BOUNDARIES AND HEADQUARTERS


ALASKA
HAWAII
AMERICAN SAMOA
GUAM
TRUST TER. OF PACIFIC ISLANDS
WAKE ISLAND
PUERTO RICO
VIRGIN ISLANDS
WASHINGTON
Seattle
OREGON
IDAHO
X
MONTANA
CALIFORNIA
NEVADA
San Francisco
IX
UTAH
ARIZONA
WYOMING
VIII
COLORADO
Denver
NEW MEXICO
NORTH DAKOTA
SOUTH DAKOTA
NEBRASKA
KANSAS
VII
IOWA
MISSOURI
Kansas City
TEXAS
OKLAHOMA
VI
Dallas
ARKANSAS
LOUISIANA
MINNESOTA
WISCONSIN
MICHIGAN
Chicago
ILLINOIS
INDIANA
OHIO
V
KENTUCKY
TENNESSEE
MISS.
ALABAMA
GEORGIA
Atlanta
S. CAROLINA
NORTH CAROLINA
FLORIDA
IV
W. VIRGINIA
VIRGINIA
MD.
D.C.
DEL.
PENNSYLVANIA
Phila.
III
NEW JER.
NEW YORK
N.Y.
II
CONN.
R.I.
MASS.
Boston
N.H.
VT.
MAINE
I

REGION	HEADQUARTERS	
I	Boston, Mass.	02203
II	New York, N.Y.	10007
III	Philadelphia Pa.	19106
IV	Atlanta Ga.	30323
V	Chicago, Ill.	60607
VI	Dallas Tex.	75202
VII	Kansas City, Mo.	64106
VIII	Denver, Colo.	80202
IX	San Francisco, Calif	94102
X	Seattle Wash.	98101

Form HEW-110 (Rev. 7/70)

Appendix D

Sampling Methodology and Sampling Error Computation

APPENDIX D

Sampling Methodology and Sampling Error Computation

I. OVERVIEW

A chief objective of the Educational Talent Search (ETS) study was to obtain, from the student files maintained by the ETS projects, descriptive data about the types of clients that were served by the ETS program. Since very little was known about the specifics of the record keeping processes within the individual ETS projects, the procedures that were set up to use those records as a source of information had to be tentative, flexible, and general in nature.

The ETS study involved a census of the entire population of 114 ETS projects funded during fiscal year 1973, a sample of 25 ETS projects from which a sample of certain former ETS clients was selected and a subsample of 20 of the 25 ETS projects from which a sample of certain current ETS clients was selected during site visits by RTI research teams. Although the initial plans had called for the site visitation sample to consist of all 25 ETS projects that were selected for the survey of certain former ETS clients, the advent of the energy crisis and associated increase in transportation costs forced the reduction of the number of sample projects that could be visited from 25 to 20 projects. Practical considerations dictated that the sample of 25 ETS projects and subsample of 20 projects be drawn from the population of 111 ETS projects which were funded during fiscal year 1973 and which were located in coterminous United States.

A graphical description of the samples is presented in Figure D.1. The sampling procedures used for the selection of sample projects are discussed below in Section II. Section III contains a description of the procedures used in selecting the current ETS clients from the files in the 20 sample project offices. Section IV contains a description of procedures used for the selection of the former ETS clients from the 25 sample projects. Estimation of population characteristics and estimation of sampling errors are discussed in general in Section V, and more specifically for the current ETS clients and for the past ETS clients in Section VI.

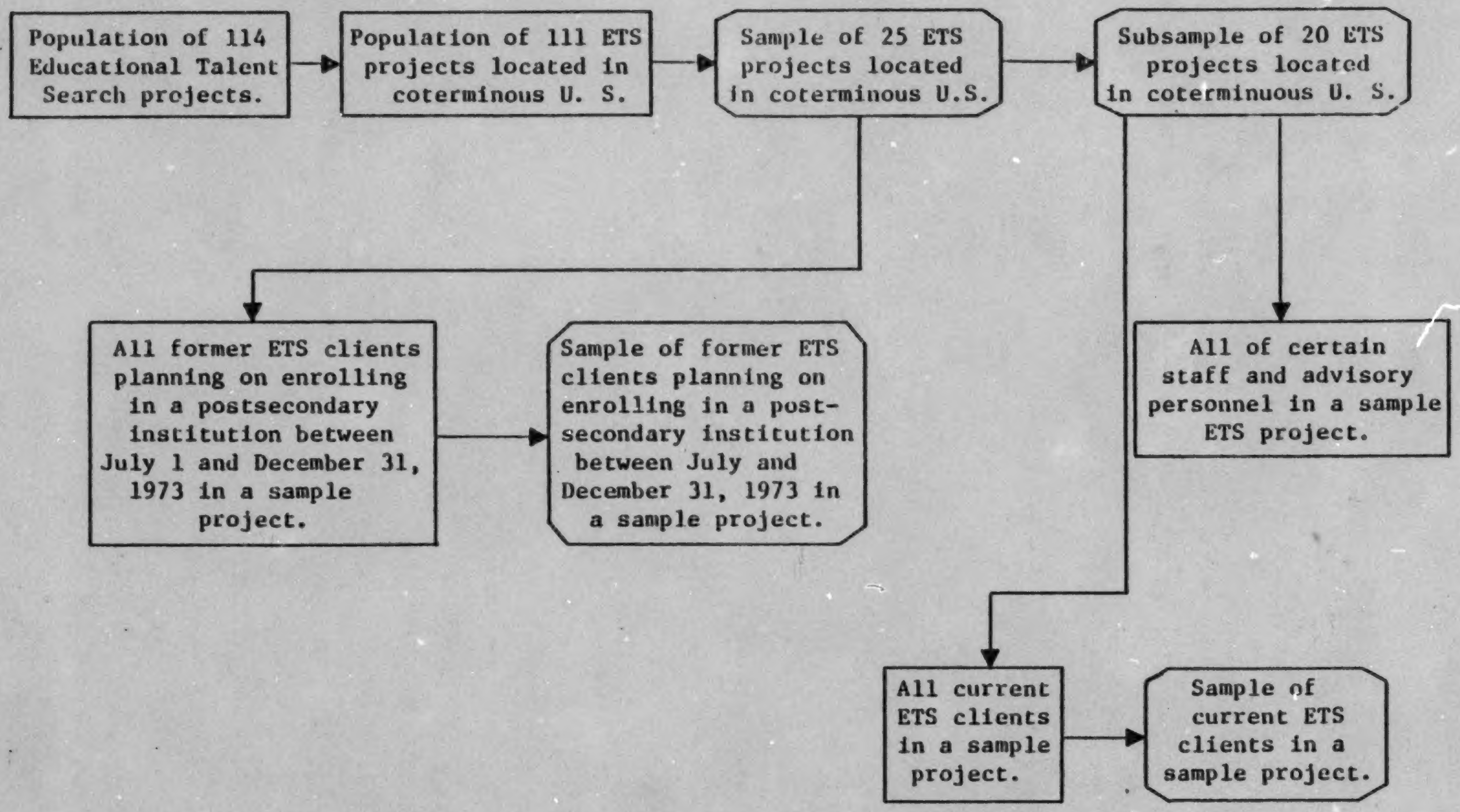

Population of 114 Educational Talent Search projects.
Population of 111 ETS projects located in coterminous U. S.
Sample of 25 ETS projects located in coterminous U.S.
Subsample of 20 ETS projects located in coterminous U. S.
All former ETS clients planning on enrolling in a postsecondary institution between July 1 and December 31, 1973 in a sample project.
Sample of former ETS clients planning on enrolling in a post-secondary institution between July and December 31, 1973 in a sample project.
All of certain staff and advisory personnel in a sample ETS project.
All current ETS clients in a sample project.
Sample of current ETS clients in a sample project.

Figure D.1. The Structure of the Educational Talent Search Project and Client Samples.

II. THE ETS PROJECT SAMPLE

From the population of 111 ETS projects funded for fiscal year 1973 and located in coterminous United States, a random sample of 25 projects was selected. The data to be collected from these 25 sample projects pertained to the projects themselves and also to the clients they served. Aiming toward insuring proper representation from the various diverse segments of the population, all 111 projects were first categorized according to geographic region, ethnicity of clients, whether or not Indian clients were located on a reservation, whether or not non-Indian projects were in a city with a population over one-half million, and according to number of clients proposed to be served.

A probability sample of 25 projects was then selected under the following constraints: the largest project, which proposed to serve 9,000 clients, was to be selected with certainty; at least one project was to be selected from each of the 10 geographic regions; ethnic and locational groupings were to be represented in the sample in the same proportion as they were in the population of ETS projects; projects proposing to serve more than 2,000 clients were to be selected at twice the probability as projects proposing to serve from 501 to 2,000 clients, while the smallest projects, namely those proposing to serve 500 or fewer clients, were to be selected at one half the probability as those in the middle size (501 to 2,000 clients). Having set the above constraints, a controlled selection procedure[1] was used to select a probability sample of 25 ETS projects, and then was used again to sub-select 20 of the 25 projects.

Controlled selection is a probability sampling procedure that is particularly well suited to the selection of a small size sample when one wishes to stratify on more variables than can practically be worked into the selection procedure. The controlled selection procedure essentially involved the formation of many different samples, each consisting of 25 projects and each balanced according to the constraints set down above. In forming the many possible samples, each of the 111 ETS projects in the population was placed in at least one sample, and some were placed in more than one. One sample, from among all of the many possible samples, was then randomly selected. The 25 projects making up the randomly selected sample became the sample of 25 projects for the mail survey of former ETS clients. Using exactly the same controlled selection procedure, a subsample of 20 of the 25 projects was selected for site visitation.

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[1] Goodman, R., and Kish, L. (1950), "Controlled selection--a technique in probability sampling," JASA, 45, 350, 372.

The distributions for the population of 111 ETS projects; the sample of 20 projects; and the sample of 25 projects on the variables used in the controlled selection procedure are presented in Table D.1.

The distributions of the two samples of projects are very close to the distribution of the population of ETS projects on ethnic composition, region, and type of location. The distributions of the sample projects on size-of-project vary considerably from the population distribution because the selection procedure sampled larger projects at a greater rate than it sampled smaller projects.

III. THE CURRENT ETS CLIENT SAMPLE

A sample from the population of current ETS clients was selected. A current ETS client was defined as any person who had had at least one official contact with the project during the period July 1, 1973 through March 31, 1974 and for whom the project had created a file. This definition differs from the USOE definition of a client as an individual who has received two or more personal contacts of a sustained counseling nature. Since the basic purpose of this descriptive study of ETS clients was to determine the nature of the actual ETS target population, the study was not limited to assessing only the subpopulation of clients who stayed long enough to meet the more restrictive USOE definition of two sustained counseling contacts. However, since the descriptive data were to be collected from project files, it was necessary to restrict the definition of the population to be sampled to those clients for whom a file had been established.

TABLE D.1
DISTRIBUTION OF ETS PROJECTS BY ETHNIC COMPOSITION, REGION, TYPE OF LOCATION, AND SIZE OF PROJECT

a. Ethnic Composition

Ethnic Composition	Population of 111 Projects	Sample 20 Projects	Sample of 25 Projects
	(Percents)	(Percents)	(Percents)
1. Black	12	15	15
2. Black and White	31	25	28
3. Indian (10%+)	17	20	16
4. Mexican (10%+)	26	25	28
5. Puerto Rican (10%+)	12	15	12
6. Other	2	0	0
TOTAL	100	100	100

b. Region

Region	Population of 111 Projects	Sample of 20 Projects	Sample of 25 Projects
	(Percents)	(Percents)	(Percents)
1	7	5	5
2	9	10	8
3	9	10	8
4	18	20	20
5	11	10	12
6	14	15	16
7	7	5	4
8	5	5	4
9	13	15	16
10	7	5	8
TOTAL	100	100	100

TABLE D.1 (Continued)

c. Type of Location

Type of Location	Population of 111 Projects	Sample of 20 Projects	Sample of 25 Projects
	(Percents)	(Percents)	(Percents)
Large City	23	25	28
Reservation	9	10	8
Other	68	65	64
TOTAL	100	100	100

d. Size of Project

Size of Project	Population of 111 Projects	Sample of 20 Projects	Sample of 25 Projects
	(Percents)	(Percents)	(Percents)
500 or fewer clients	27	10	8
501 - 2,000 clients	59	65	64
2,001 - 8,999 clients	13	20	24
9,000 clients	1	5	4
TOTAL	100	100	100

The sample of current ETS clients was selected in two stages, first projects, then clients within projects. The first stage consisted of the 20 sample projects selected as described in section II above. Within each sample project, a random sample of about 100 current ETS clients was selected, using a systematic random selection procedure.

The "listing" of these clients was the ordered files of clients' records. After a random start, each k-th folder was pulled and the record examined. If the client associated with that record fit the above listed definition of a current ETS client, then the client was considered to have been selected into the sample and descriptive information about the client was recorded. If the client did not fit the definition of a current ETS client, he was not included in the sample of current ETS clients, consequently no information was recorded for him.

This procedure was used for most sample projects. However, for certain projects using a filing system that did not lend itself to this procedure, a modification of this sampling procedure was used.

A total of 1,837 current ETS clients were selected into the sample from the 20 sample projects. The client record data for these sample clients were then collected by RTI site-visit team members.

IV. THE ETS FORMER CLIENT SAMPLE

A sample of about 80 past clients who were reported to have enrolled in a postsecondary institution for the first time during the period July 1-December 31, 1973 was drawn from each of the 25 sample projects. A systematic random sampling procedure was used to select the sample of clients from listings provided to RTI by each of the 25 sample projects. (As discussed in Chapter 7 there was some inconsistency in the type of data that was actually provided by the directors of the 25 projects.) After selection, the names of the sample former ETS clients were sorted by the institution in which they intended to enroll and each such institution was then queried about the enrollment characteristics of each client that was identified as planning to enroll there.

The listings of former ETS clients were actually obtained from 24 of the 25 sample ETS projects, one new project having no such clients. Of the 2,060 sample former clients, enrollment verification information was obtained for 1,793, representing a client response rate of 87 percent.

Of the 453 college registrars that were queried about the registration status of these former clients, responses were obtained from 426, representing an instituational response rate of 93 percent.

V. ESTIMATION OF POPULATION CHARACTERISTICS AND ESTIMATION OF SAMPLING ERRORS

At each stage of the sample selection, each unit in the defined population was given a positive chance of being selected. These probabilities were recorded and combined into an overall probability of selection for each client in the sample, thus providing for the computation of unbiased estimates of population characteristics of current ETS clients as a whole, as well as for former clients who are classified as having enrolled in a postsecondary institution for the first time during the period July 1 - December 31, 1973.[2] In addition to student estimates, unbiased estimates of project characteristics are possible. In order to make unbiased estimates, however, it was necessary to assign a weight to each sample element. The weight assigned was simply the inverse of the probability the element had of being selected. Thus, when estimating characteristics of the population of 111 ETS projects from the sample of 20 or 25 projects, each of the sample projects was weighted by the inverse of its probability of being selected. When making estimates of student characteristics, each student was weighted by the inverse of his probability of being selected. Thus,

$$(\text{sample project weight}) = \frac{1}{\left(\begin{array}{l}\text{probability of selecting ETS}\\ \text{project into sample}\end{array}\right)} \text{ ; and}$$

$$\begin{aligned}(\text{sample student weight}) &= \frac{1}{\left(\begin{array}{l}\text{probability of selecting}\\ \text{student into the sample}\end{array}\right)}\\ &= \frac{1}{\left(\begin{array}{l}\text{probability of}\\ \text{selecting student's}\\ \text{ETS project}\end{array}\right)\left(\begin{array}{l}\text{probability of selecting}\\ \text{the student, given}\\ \text{that his ETS project}\\ \text{was selected}\end{array}\right)}\end{aligned}$$

---

[2] While the sampling and estimation procedures used provide for unbiased estimates, the unexpected inconsistent nature of the listings of former ETS clients provided to RTI by the sample projects result in biased estimates. (See Chapter 7 for further explanation.)

While the procedure used in selecting the sample of 25 projects and the subsample of 20 projects permits the calculation of unbiased estimates of population characteristics from the sample data, these estimates are not exact figures, but are subject to sampling error. Sampling error is error that must be tolerated because one chooses to select and measure only a sample rather than an entire population. Sampling error (or standard error) represents the variability among the totality of estimates that would be made from the many different possible samples that could have been selected.

The use of a controlled selection sampling procedure does not permit the unbiased estimation of error variances (the square of the standard error) from the sample data itself. It is possible, however, to approximate the error variance by means of a formula that will provide an overestimate of the error variance. In order to keep the amount of overestimation to a minimum, the assumption was made that the sample projects were selected from six strata, the sixth of which contained only one project which was selected with certainty.

Formulas for the estimation of student characteristics, as well as formulas for determining the sampling error of these estimates are presented below.

$$X' = \sum_{h=1}^{6} \sum_{i=1}^{n_h} \sum_{j=1}^{m_{hi}} w_{hij} \, x_{hij} \text{ where:}$$

X' = estimate of population total X.

x_{hij} = value of the jth student in the ith project in the hth stratum.

w_{hij} = weight of the jth student in the ith project in the hth stratum.

m_{hi} = number of sample students in the ith project of the hth stratum.

n_h = the number of sample projects in the hth stratum.

Similarly,

$$Y' = \sum_{h=1}^{6} \sum_{i=1}^{n_h} \sum_{j=1}^{m_{hi}} w_{hij} \, y_{hij} \text{ where:}$$

Y' = estimate of population total Y.

y_{hij} = the value of the jth student in the ith project in the hth stratum.

and other terms are as defined above.

A population proportion can then be estimated from the following formula:

$$P' = \frac{X'}{Y'} \quad \text{where:}$$

P' = estimate of population proportion P.

Y' = estimate of total persons in population (or population subgroup).

X' = estimate of total persons having a given characteristics in population (or population subgroup).

The sampling error (or standard error) of the estimated proportion P' can be calculated using the following formula:

$$\mathrm{var}(P') = \mathrm{var}\left(\frac{X'}{Y'}\right) = \frac{1}{(Y')^2}\left\{\left[\sum_{h=1}^{5} \frac{n_h \sum_{i=1}^{n_h}\left(\sum_{j=1}^{m_{hi}} w_{hij}x_{hij}\right)^2 - \left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi}} w_{hij}x_{hij}\right)^2}{n_h-1}\right]\right.$$

$$- 2P'\left[\sum_{h=1}^{5} \frac{n_h \sum_{i=1}^{n_h}\left(\sum_{j=1}^{m_{hi}} w_{hij}x_{hij}\right)\left(\sum_{i=1}^{m_{hi}} w_{hij}y_{hij}\right) - \left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi}} w_{hij}x_{hij}\right)\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi}} w_{hij}y_{hij}\right)}{n_h-1}\right]$$

$$+ (P')^2\left[\sum_{h=1}^{5} \frac{n_h \sum_{i=1}^{n_h}\left(\sum_{j=1}^{m_{hi}} w_{hij}y_{hij}\right)^2 - \left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi}} w_{hij}y_{hij}\right)^2}{n_h-1}\right]$$

$$\left. + \frac{7}{8}\left[\frac{\sum_{j=1}^{m_{6,1}}\left(w_{6,1,j}x_{6,1,j}\right)\sum_{j=1}^{m_{6,1}}\left(w_{6,1,j}y_{6,1,j}\right) - \left(\sum_{j=1}^{m_{6,1}} w_{6,1,j}x_{6,1,j}\right)^2}{m_{6,1}-1}\right]\right\} \qquad (1)$$

where all terms are as defined above. The standard error for an estimated proportion P' is then obtained as follows:

$$\text{standard error } (P') = \sqrt{\mathrm{var}\ (P')}\ . \qquad (2)$$

The standard error for an estimated percent ($100P'$) would then be:

$$\text{standard error } (100P') = 100 \text{ standard error } (P') = 100\sqrt{\mathrm{var}(P')}\ . \qquad (3)$$

In using the above formula to compute the error variance of an estimated proportion P' that represented, for example, the estimated proportion of current ETS clients that were female,

$$x_{hij} = \begin{cases} 1 \text{ for every female current ETS client.} \\ 0 \text{ for every nonfemale current ETS client.} \end{cases}$$

$$y_{hij} = 1 \text{ for every current ETS client.}$$

If one wished to estimate the error variance of an estimated proportion P' that represented, for example, the estimated proportion of black current ETS clients that were female,

$$x_{hij} = \begin{cases} 1 \text{ for every black female current ETS client.} \\ 0 \text{ for all other current ETS clients.} \end{cases}$$

$$y_{hij} = \begin{cases} 1 \text{ for every black current ETS client.} \\ 0 \text{ for every nonblack current ETS client.} \end{cases}$$

To estimate the error variance for the difference between two estimated proportions, $P'_{(1)} - P'_{(2)}$ where subscripts (1) and (2) refer to the two subgroups, the following formula would be used.

$$\text{var}\left[P'_{(1)} - P'_{(2)}\right] = \text{var}\left(P'_{(1)}\right) + \text{var}\left(P'_{(2)}\right) - 2\,\text{cov}\left[P'_{(1)}\ P'_{(2)}\right]. \qquad (4)$$

The $\text{var}\left(P'_{(1)}\right)$ and $\text{var}\left(P'_{(2)}\right)$ would be computed using formula (1) above, in each case restricting the computations to the particular subgroup in question.

To compute the covariance term:

$$\text{Cov}\left(P'_{(1)}P'_{(2)}\right) = \frac{1}{Y'_{(1)}Y'_{(2)}}\left\{\sum_{h=1}^{5}\left[\frac{n_h\sum_{i=1}^{n_h}\left(\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}x_{hij(1)}\right)\left(\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}x_{hij(2)}\right)}{n_h-1}\right.\right.$$

$$\left.-\frac{\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}x_{hij(1)}\right)\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}x_{hij(2)}\right)}{n_h-1}\right]$$

$$-\frac{X'_{(1)}}{Y'_{(1)}}\sum_{h=1}^{5}\left[\frac{n_h\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}x_{hij(2)}\right)\left(\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}y_{hij(1)}\right)}{n_h-1}\right.$$

$$\left.-\frac{\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}x_{hij(2)}\right)\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}y_{hij(1)}\right)}{n_h-1}\right]$$

$$-\frac{X'_{(2)}}{Y'_{(2)}}\sum_{h=1}^{5}\left[\frac{n_h\sum_{i=1}^{n_h}\left(\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}\;{}_{hij(1)}\right)\left(\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}\,y_{hij(2)}\right)}{n_h-1}\right.$$

$$\left.-\frac{\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}\,x_{hij(1)}\right)\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}\,y_{hij(2)}\right)}{n_h-1}\right]$$

$$+\frac{X'_{(1)}X'_{(2)}}{Y'_{(1)}Y'_{(2)}}\sum_{h=1}^{5}\left[\frac{n_h\sum_{i=1}^{n_h}\left(\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}\,y_{hij(1)}\right)\left(\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}y_{hij(2)}\right)}{n_h-1}\right.$$

$$\left.\left.-\frac{\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(1)}} w_{hij(1)}\,y_{hij(1)}\right)\left(\sum_{i=1}^{n_h}\sum_{j=1}^{m_{hi(2)}} w_{hij(2)}y_{hij(2)}\right)}{n_h-1}\right]\right\}$$

A sampling error (or standard error) is used in conjunction with an estimate of a population value based on sample data. The sampling error provides a measure of the variability one can expect due to making this estimate from sample data, rather than calculating the value using data from an entire population. The chances are about two out of three that the range of one standard error on either side of the population estimate includes the true population figure, while the chances are about 95 percent that the true population figure is included in the range of two standard errors on either side of the population estimate.

VI. SAMPLING ERRORS FOR CURRENT ETS CLIENTS AND FOR ETS CLIENTS REPORTED AS BEGINNING POSTSECONDARY EDUCATION

Using the formulas shown in Section V above, estimates of sampling errors were computed for a selection of percentages pertaining to current ETS clients and for a selection of items pertaining to ETS clients reported as beginning postsecondary education. The results of these calculations are presented in Table D.2 and D.3.

In order to provide a general order of magnitude of the standard errors for estimated percents for which standard errors were not computed, generalized tables of standard errors were created (see Table 6.1 and Table 7.1) in Chapters 6 and 7 respectively using the results of the sampling error calculations that were made. The procedures used to create these tables are described below.

a) For each item for which a sampling error was computed, a measure of the design effect (DEFF) was also computed. DEFF is a measure of the total effect on the error variance caused by the complexities of the sample design, including the effects of stratification, clustering, and unequal probabilities of selection. DEFF is computed as follows:

$$\text{DEFF} = \frac{\text{var}(P')}{\left(\dfrac{P'Q'}{\text{sample size}}\right)} = \frac{\left(\begin{array}{l}\text{variance of } P' \text{ based}\\ \text{on the sample design}\\ \text{actually used}\end{array}\right)}{\left(\begin{array}{l}\text{variance of } P' \text{ if a}\\ \text{simple random sample}\\ \text{containing the same}\\ \text{number of individuals}\\ \text{had been used}\end{array}\right)}$$

where:

$\text{var}(P')$ = the variance computed according to the formulas in Section V.

P' = the estimated proportion for which the sampling error was calculated.

Q' = $1-P'$.

sample size = the number of individuals included in the sample and used as a base for computing P'.

b) For groups of similar items, e.g. items referring to the type and extent to which certain information is kept in the project files of current ETS clients, the DEFFs were averaged.

c) Using the average DEFF obtained as in b above, the standard errors for a generalized table were computed using the following formula:

$$\text{standard error } (100\,P') = 100\sqrt{\text{var}\,(P')}$$

$$= 100\sqrt{\text{DEFF}\,\frac{P'Q'}{\text{sample size}}}$$

where all terms are as defined above.

The generalized tables, thus, provide only a rough measure of the magnitude of the sampling error that applies to an estimated percent. If a more accurate measure is needed, the sampling error must be calculated for the specific item.

The items for which sampling errors were computed are presented in Table D.2 for current ETS clients, and in Table D.3 for ETS clients reported as entering postsecondary education.

Table D.2

ESTIMATED STANDARD ERRORS FOR ESTIMATED PERCENTAGES RELATING CURRENT ETS CLIENTS

Table in Which Item Appears	Item	Estimated Percent	Estimated Standard Error (In Percentage Points)
Table 6.2	Of current ETS clients, percent for whom descriptive information was available in project files:		
	1. Age at intake.	89	5.7
	2. Sex.	92	4.2
	3. Ethnicity.	89	5.5
	4. Marital status at intake.	65	10.0
	5. Work status at intake.	47	12.5
	6. Approximate client income.	41	12.0
	7. Approximate family income.	74	6.8
	8. Source of family income.	40	11.0
	9. Grade level at intake.	84	7.6
	10. Highest grade level completed at intake.	84	7.6
	11. Transcripts.	20	5.8
	12. Letters of recommendation.	10	3.6
	13. PSAT scores.	3	2.3
	14. SAT scores.	9	4.2
	15. ACT scores.	10	7.8
	16. Other achievement scores	6	2.6
	17. Aptitude scores.	6	3.4
	18. Financial aid applications.	35	5.7
	19. Parents' confidential statement.	33	5.6
Table 6.4	Of current ETS clients, percent having a specified characteristic:		
	20. Black.	41	9.4
	21. American Indian.	22	6.5
	22. Mexican American.	17	4.8
	23. White.	17	9.5
	24. Age at intake 12-16 years.	14	3.5
	25. Age at intake 19+ years.	19	3.1
	26. Female.	56	3.0

- continued -

Table D.2 (continued)

Table in Which Item Appears	Item	Estimated Percent	Estimated Standard Error (In Percentage Points)
Table 6.5 or 6.5A or 6.5B	27. Age at intame 12-16 years.	14	3.5
	28. Age at intake 19+ years.	19	3.1
	29. Female.	56	3.0
	30. Of Indians, percent 16 years old or less at intake.	33	16.3
	31. Of non-Indians, percent 16 years old or less at intake.	18	4.1
	32. The difference between the percents in items (30) and (31).	25	16.7
	33. Of Mexican-American, percent female.	47	2.5
	34. Of non-Mexican-Americans, percent female.	57	1.9
	35. The difference between the percents in items (33) and (34).	10	3.5
Table 6.7	36. Clients with family income $6,000 or above.	26	5.4
Table 6.11	37. Clients in grade 11 or less at initial contact.	14	3.6
	38. Percent of clients who were not enrolled at school at first contact and who had not completed high school.	4	1.8
Table 6.12	39. Clients in grade 11 or less at initial contact.	14	3.6
Table 6.14	40. Clients for whom low income and related criteria were used for eligibility.	81	5.0
Table 6.15	41. Of those with family income $6,000 or above percent for whom low income eligibility criteria were used.	61	13.9
Table 6.16	42. Clients with one contact as of March 31, 1974.	14	5.1
	43. Clients with 6+ contacts as of March 31, 1974.	30	8.0

Table D.3

ESTIMATED STANDARD ERRORS FOR ESTIMATED PERCENTAGES RELATING TO POSTSECONDARY ETS CLIENTS

Table in Which Item Appears	Item	Estimated Percent	Estimated Standard Error (In Percentage Points)
Table 7.2	1. Of ETS clients reported as entering a postsecondary institution between 1 July and 31 December 1973, the percent who were verified as having enrolled in that institution.	71	4.4
Table 7.3	2. Of ETS clients verified as entering a postsecondary institution, percent who were still enrolled in the spring of 1974.	72	1.3
Table 7.4	3. Of those ETS clients who were no longer enrolled in the spring of 1974, the percent who dropped out.	68	5.3
Table 7.5	Of ETS clients reported as entering a postsecondary institution between 1 July and 31 December 1973, ...		
	4. ... the percent reported as enrolling in that 2-year public institution.	18	3.0
	5. ... the percent reported as enrolling in that 4-year public institution.	59	6.5
	6. ... the percent reported as enrolling in that 4-year private institution.	16	5.1
	7. ... the percent who were verified as having enrolled in that institution.	71	4.4
Table 7.6 or 7.6A	8. Of ETS clients reported as entering a postsecondary institution between 1 July and 31 December 1973, the percent who were verified as having enrolled in that institution.	71	4.4

- continued -

Table D.3 (continued)

Table in Which Item Appears	Item	Estimated Percent	Estimated Standard Error (In Percentage Points)
Table 7.6 or 7.6A (continued)	9. Of ETS clients reported as entering a public postsecondary institution, the percent who were verified as having enrolled in that institution.	70	3.6
	10. Of ETS clients reported as entering a private postsecondary institution, the percent who were verified as having enrolled in that institution.	85	4.2
	11. The difference between the percents in items (9) and (10).	15	5.3
Table 7.7	12. Of ETS clients verified as entering a postsecondary institution, percent who were still enrolled in the spring of 1974.	72	1.3
Table 7.8 or 7.8A	13. Of ETS clients verified as entering a postsecondary institution, the percent who were still enrolled in the spring of 1974.	72	1.3
	14. Of ETS clients reported as entering a two year institution, the percent who were verified as having enrolled in that institution.	62	6.5
	15. Of ETS clients reported as entering a four-year institution, the percent who were verified as having enrolled in that institution.	76	2.0
	16. The difference between the percents in items (14) and (15).	14	7.4
Table 7.9 or 7.10	17. Of those ETS clients who were no longer enrolled in the spring of 1974, the percent who dropped out.	68	5.3

- continued -

Table D.3 (continued)

Table in Which Item Appears	Item	Estimated Percent	Estimated Standard Error (In Percentage Points)
Table 7.11 or 7.12	18. Of ETS clients verified as enrolling in postsecondary, percent with grade point average 2.0 or better.	44	8.0

Appendix E

Data Collection and Processing Procedures

Appendix E

Data Collection and Processing Procedures

I. INTRODUCTION

The study of the Educational Talent Search (ETS) program involved six components in which a variety of strategies for gathering descriptive data were utilized. Seven instruments (or forms) were designed and used in the study. The instrument titles and a description of each are provided below. The appendix containing a copy of the instrument is indicated in parentheses after the title.

1. Talent Search Project Director Questionnaire (Appendix G)

   This questionnaire was designed to gather information on the background and experience of the project director, the strategies and processes of his program, the type of clients served by his program, budgetary and administrative information, degree of the project's cooperation with outside agencies and institutions, and his perceptions of the program's problems and accomplishments.

2. Talent Search Project Counselor Questionnaire (Appendix H)

   This instrument gathered information on the background, experience, and training of the counseling staff, and on the allocation of the staff's time among various activities, content of the counseling program, and degree of cooperation between the counseling programs of the project and of the educational institutions with which they work and interact. This instrument was distributed to the individual who the project director deemed most knowledgeable about the project's counseling component.

3. Talent Search Advisory Council Chairperson Questionnaire (Appendix I)

   This questionnaire gathered information describing the activities and contributions of the council and its relationship to the project.

4. Educational Talent Search Site Visit Protocol (Appendix F)

This protocol defined the procedures and general format for site visits to the sample of 20 ETS projects. The protocol also contains a series of interview guides that lists the topics to be covered in the interviews with the project director, selected staff members, the chairperson of the project advisory board or council, and a representative of the institution hosting the project.

5. Talent Search Clients Who Began Studies at a Postsecondary Educational Institution Between July 1 and December 31, 1973 (Appendix L)

This form requested, from each project director, a listing of all former clients who began studies at a postsecondary educational institution during the months of July through December 1973. It also requested the name and address of the institution for each listed student.

6. Educational Talent Search Client Record Form (Appendix J)

This form was completed during site visits by RTI field data collectors. It includes information on the client's background, educational status at the time of initial ETS contact, services provided him by ETS, and changes in his educational status during or after contact with ETS.

7. Educational Talent Search Client Postsecondary Status Report (Appendix M)

This form, sent to college registrars of institutions in which ETS clients were reported to have enrolled, requested the registrar to indicate whether the student did, in fact, enroll; whether he is still enrolled; his reasons for leaving if no longer enrolled; and the student's most recent grade point average.

In addition, certain existing ETS forms and reports were gathered in order to obtain fiscal data and classification data on ETS projects. These forms and reports include:

1) USOE Form 1227 (a copy of USOE Form 1227 is shown in Appendix N): a report by project which gives a cumulative summary by quarter of the total funds approved and the total funds

expended by cost category for federal and non-federal funding sources.

2) The 1974 Audit Report: this fiscal audit by an independent agency was obtained from 12 of the 20 ETS projects which received a site visit.

3) USOE Form 1231 (a copy of USOE Form 1231 is shown in Appendix B): a report on clients served by the project and program accomplishments for the program year 1973-74.

Data collection and data processing activities for the ETS study spanned a time period from January 1974 to January 1975. Table E.1 provides a general time schedule of these activities for each component of the ETS study. This chart serves as a reference document for the discussions of the activities discussed in Sections II through VI of this appendix.

The remainder of this appendix provides a detailed description of the data collection and data processing procedures used in each component of the ETS study. The organization of this presentation is as follows:

Section II describes the data collection and processing procedures for the project director, project counselor, and advisory council chairperson questionnaires.

Section III describes the data collection and processing procedures for the ETS Postsecondary Status Reports.

Section IV describes the general format and procedures used in conducting site visits at 20 ETS projects.

Section V describes the data collection and processing procedures used for the data on ETS current clients.

Section VI describes the procedures used in collecting and processing USOE 1227 forms and 1974 ETS audit reports from projects.

Section VII describes the procedures used in collecting, processing, and utilization of data extracted from the USOE Form 1231.

Response rates for each instrument or collected form will be provided at the end of the discussion of data collection procedures for that instrument.

A detailed discussion of sampling procedures is presented in Appendix D.

Table E.1

EDUCATIONAL TALENT SEARCH STUDY DATA COLLECTION AND DATA PROCESSING SCHEDULE

Task	1974												1975
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.
I. Project Staff Questionnaires													
A. Data Collection Schedule													
1. Mail out questionnaires				■									
2. First mail follow-up to projects					■								
3. Follow-up at projects by RTI site visit teams				■	■	■							
4. Second mail follow-up to projects (with copies to USOE regions)					■								
5. Letter to USOE regional offices requesting assistance with follow-up								■					
6. Telephone request to USOE regional offices											■		
B. Data Processing Schedule													
1. Write coding manual											■		
2. Coding and reliability checking											■		
3. Keypunch data												■	
4. Computer edits												■	■
II. Postsecondary Status Reports													
A. Data Collection													
1. Request for list of clients sent to projects		■											
2. Telephone follow-ups to nonresponding projects		■	■										
3. Verification forms mailed to college registrars					■								
4. Mail follow-up to nonresponding registrars								■					

- continued -

Table E.1 (continued)

Task	1974												1975
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.
B. Data Processing													
1. Coding and reliability checking										■			
2. Keypunch data											■		
3. Computer edits and checks											■		
III. ATS Site Visits													
A. Data Collection													
1. Initial arrangements and scheduling		■	■	■	■								
2. Conducting site visits													
a. Three pilot visits			■										
b. Remaining 17 visits				■	■	■							
B. Compiling Reports				■	■	■	■	■					
IV. Client Record Forms													
A. Data Collection			■	■	■	■							
B. Data Processing													
1. Keypunching									■				
2. Computer edits and checks										■			
V. OE 1227 Forms and 1974 Audit Reports													
A. Data Collection													
1. Mail request to projects										■			
2. Follow-up through USOE regional offices											■		
B. Data Processing													
1. Coding data										■	■	■	■
2. Keypunching data													■
3. Editing and checking													■

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Table E.1 (continued)

Task	1974												
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.
VI. USOE Form 1231													
A. Data Collection (responding and nonresponding projects												■	
B. Data Processing (for responding projects only)													
1. Coding data												■	
2. Keypunching data													■
3. Editing and checking													■

II. ETS PROJECT DIRECTOR, COUNSELOR, AND ADVISORY COUNCIL CHAIRPERSON QUESTIONNAIRES

A. Data Collection Procedures

1. Preliminary Contacts with ETS Projects

Before data collection procedures were initiated, preliminary contacts were made with ETS project directors to familiarize them with the study. In February, each project director was mailed a letter which introduced and provided an overview of the study and which solicited the cooperation of the project director for the implementation of the research design.

2. Data Collection and Follow-Up Procedures

The basic data collection strategy involved a mail survey to all 114 ETS projects funded in program year 1973-74. In late April 1974, the three questionnaires were sent together in a packet directly to each of the 114 project directors. These three questionnaires included: (a) a Talent Search Project Director Questionnaire; (b) a Talent Search Counselor Questionnaire; and (c) an Advisory Council Chairperson Questionnaire. A cover letter requested that the project director complete the project director questionnaire and distribute the other two questionnaires for completion. With respect to the project counselor questionnaire, the project director was instructed to give the instrument to the person he deemed most knowledgeable about project counseling functions. (The project director could complete the questionnaire himself if he felt most knowledgeable about project counseling operations, as might be the case in small projects.) Each of these three questionnaires was accompanied by a cover letter which explained the purpose of the questionnaire and assured the confidentiality of all responses. Also included was a postage-paid, self-addressed envelope for convenience in returning the questionnaire to RTI. In each cover letter the respondent was urged to complete and return the questionnaire as soon as possible.

After the April 1974 mailing of the questionnaires, several follow-up procedures were used to obtain questionnaires not initially returned for various projects. In mid-May a reminder letter was sent to each project for which one or more questionnaires were missing. This letter urged projects to return all missing questionnaires as soon as possible. After receiving this initial follow-up letter, many project directors requested additional copies of the questionnaires, claiming that the questionnaires mailed in April had either not been received or had been received and were misplaced. In these cases, additional copies of the questionnaires were mailed. Also, during April, May, and June, RTI site-visit teams made personal requests for the return of missing questionnaires from the projects visited during these months. In mid-June, a second letter was mailed to all project directors whose projects still had outstanding staff questionnaires.

In August 1974, another follow-up was initiated through the national and 10 regional offices of the Office of Education. Each regional office was mailed a letter which listed every questionnaire missing for each project in that region. RTI requested that the regional office staff call the nonresponding projects to request cooperation with the study. Copies of these letters were mailed to the Regional Commissioners of Education and to Dr. Leonard Spearman, Director, Division of Student Support and Special Programs. Later, in October a similar letter was again sent to the regional offices listing the remaining projects for which questionnaires were missing. In November, a final follow-up was made by telephone to the regional offices, again requesting that they contact nonresponding projects.

The final response rates for this component were as follows:

a) For the project director questionnaire, 105 of 114 questionnaires were returned giving a response rate of 92 percent.

b) For the project counselor questionnaire, 106 of 114 questionnaires were returned giving a response rate of 93 percent. Unfortunately, two of the returned counselor questionnaires were misplaced and the analysis is based on a total of 104 questionnaires.

c) For the advisory council chairperson questionnaire, 93 of 114 questionnaires were returned giving a response rate of 82 percent. However, 3 of the 93 returned questionnaires were not completed by board chairpersons because the projects did not have advisory boards--1 project was new and its board had not yet been formed; the other 2 projects were in the process of reconstructing their boards. (These three questionnaires were returned by project directors.)

3. Data Processing Procedures

The processing of ETS project staff questionnaires involved four stages: (a) validation of questionnaire items, (b) manual coding and editing, (c) creation of a data file on magnetic tape, and (d) computer editing. These procedures will be discussed in detail below.

The RTI site visit teams had originally planned to verify questionnaire responses with the respondents at the 20 sites which were visited. Unfortunately, however, this validation function was limited by the fact that many of the staff members at visited projects failed to complete their questionnaires prior to the scheduled visits.

In November 1974, a manual was drafted which covered coding instructions for each item and which discussed procedures for treating such problems as skip patterns, inappropriate responses, etc. In order to create coding categories for each of the open-ended items a 30 percent sample of responses was reviewed and general categories were formed for each item. In addition, the coding supervisor reviewed and coded a 10 percent sample of the booklets in order to anticipate as much as possible what problems would arise in coding (e.g., inappropriate responses, incorrect skip patterns, and inconsistent responses). The coding instructions were then revised on the basis of the experience provided by coding the 10 percent sample. Coders then transferred data onto intermediate coding forms. The coding supervisor conducted a 25 percent reliability check on all open-ended items and a 10 percent check on all other items.

Coded responses were then keypunched from the intermediate coding forms. All cards were key verified. A data file on magnetic tape was created from the keypunched cards.

Several types of computer edits were conducted on the file to ensure the accuracy, completeness, and consistency of the file. These checks included:

a) An edit of control numbers necessary for the correct identification of records. These numbers include those which identify projects and project staff members.

b) A check for values out of range. Every item on the questionnaire has a range of possible values that the coded response can assume; a check was conducted on each item to identify values out of range.

c) A check for inconsistent responses. Potential inconsistencies in the data could occur from incorrect skip patterns and from listed numbers or percentages which do not total correctly.

Resolution of errors and inconsistencies took several forms. All control number errors and out of range responses were corrected on the file after a return to hard copy to obtain the correct code. Incorrect skip patterns were also resolved by a return to hard copy. In cases where listed numbers did not add up to the listed total (such as a listing of the number of staff members in various categories and the total number of staff members), the listed numbers (but not the total) were flagged as inconsistent. For percentages which did not add to 100 percent, the listed percentages were forced to total 100 percent. The following algorithm was used in rescaling the items:

$$P_i' = 100 \frac{P_i}{\sum_{i=1}^{n} P_i} ,$$

where P_i' is rescaled percentage, P_i is unscaled response given, and $\sum_{i=1}^{n} P_i$ is the sum of all pertinent responses given to the item (or subitem). This strategy was felt to be acceptable because (a) few items were involved and (b) the percentage totals were not far off from 100 percent (e.g., they were between 90 and 110 percent).

III. THE ETS CLIENT POSTSECONDARY STATUS REPORTS

A. Data Collection Procedures

1. Data Collection and Follow-Up Procedures

In early February 1974, a letter was mailed to project directors of all 25 sample projects. This letter presented an overview of the ETS study, advised the project director of the selection of his project as part of the 25 projects participating in the ETS postsecondary component, and requested that the project director provide RTI with a list of all his clients who had been reported in the USOE Form 1231 Interim Report as having enrolled in postsecondary institutions between 1 July and 31 December 1973. Enclosed with the letter were copies of a form to be used in listing clients. This form includes space for the client's name, his age and sex, and the name and address of the institution in which he was to have enrolled. (See Appendix L for a copy of this form.) When the forms were returned to RTI, a sample of 100 clients was selected from each project (in those cases where 100 or fewer clients were listed, all clients were followed up and no sample was drawn).

Subsequent follow-ups were made by telephone at regular intervals to those projects not responding to the request for the list of postsecondary clients and institutions.

The list of sample clients was then sorted by institution and client names were listed on a form to be mailed to each institutional registrar. (See Appendix M for a copy of this form.) In mid-May these forms were mailed to 453 college registrars. The registrars were asked to verify whether the client had enrolled between 1 July and 31 December 1973. For each client who had enrolled, the registrars were also asked to provide certain other information about the client's current enrollment status. In late August, a second set of forms was mailed to the registrars of the 69 institutions which had not responded yet to the initial request. Responses were received from 426 of 453 college registrars giving an institutional response rate of 93 percent. The response rate for postsecondary clients, however, was 1,793 of 2,060 selected clients giving a client response rate of 87 percent. The response rate for clients is lower than that for institutions because a few large institutions with many listed clients did not respond to the requests for verification of the status of the listed clients.

B. Data Processing Procedures

Before information from any forms was coded, each postsecondary institution to which a form was sent was assigned a code according to its type (e.g., two-year public, four-year public, etc.). This institution code was entered at the bottom of each form for easy reference in coding. Information on each client was then transferred to intermediate coding forms. Data were coded for each client in the sample, regardless of whether or not a response from the postsecondary institution was received for that client. All data were scanned for obvious mistakes or inconsistencies, and when errors were discovered, they were resolved through a return to the hard copy.

The data were keypunched from the intermediate coding forms and a magnetic tape data file was created from the keypunched cards. After the file was created, computer edit checks were conducted on the file to ensure the accuracy, completeness, and consistency of the file. These checks included:

1) An edit of control numbers necessary for the correct identification of records. These numbers include those which identify projects and those which identify clients within projects.
2) A check for values out of range. Every item on the form has a range of possible values that the coded response can assume. Examples of ranges to be checked include the sample weight ranges and the highest and lowest possible grade point averages. The range of possible numerical codes on each information item was checked for out-of-range codes.
3) A check for consistency of information within each form received from the registrars of the various postsecondary institutions in the sample. Examples of inconsistency checks which were performed include: (a) a check to ensure that for all clients who did enroll in the institution, a response was coded for their spring enrollment status; and (b) a check to make certain that for clients who were no longer enrolled in the spring, a response was coded for the reason for leaving school.

Errors identified through the three types of checks described above were resolved by a return to the source document. If an inconsistent response could not be corrected from the source document, it was accepted as given.

IV. ETS SITE VISITS

A. Preparations for Site Visits

Before data collection procedures were initiated, preliminary contacts were made with the ETS project directors to familiarize them with the study. An initial letter was sent, in February 1974, to the project directors of each of the 25 projects selected for the postsecondary study. This letter introduced and provided an overview of the study and solicited the project director's cooperation with the implementation of the study. In addition, this letter informed project directors that a subsample of 20 of the 25 selected projects would participate in the site visit component of the ETS study and that their project had a high probability of being selected to participate in site visits.

B. Site Visit Procedures

Two, and in some cases three, RTI staff members were assigned to a team to visit each selected project. One member of each site visitation team was assigned as a team leader and given the responsibility for making all of the site visitation arrangements. In cases where the team was composed of two members, one functioned primarily as an interviewer and the other was primarily responsible for collecting ETS current client data. In cases where the team included three team members, two functioned primarily as interviewers and one was assigned primarily to data collection. In most cases, however, the "interviewers" participated in data collection and vice versa.

The team leader contacted the project director at least one month in advance of the visit to discuss scheduling of the visit and to discuss and to answer in detail questions about the purpose and plans for the visit. Subsequent to the telephone call, a letter was mailed to each project director confirming the visit dates and firming up any other arrangements related to the visit.

Each visit lasted two to three days, during which several activities took place; i.e., ETS current client data collection, questionnaire verification, interviews, and observation of ETS operations. An instrument, the ETS Site Visit Protocol, provided a general description of the procedures and format of the site visits. (See Appendix F for a copy of this instrument.)

Interviews were conducted with as many and as wide a variety of persons associated with the project as was feasible within the time span allotted. Persons interviewed included: project directors, project counselors, coordinators, tutors, recruiters, representatives of the host institution or agency, and the Advisory Council Chairperson. A list of topics to be covered in the interviews with the individuals in the above named categories was provided as part of the site visit protocol.

Although the majority of time spent at most projects was consumed in interview activities, team members also attempted to observe a range of project activities. The site visit teams were also instructed to verify project staff questionnaire responses with the staff members who had completed the instruments. This planned activity, however, was limited because most questionnaires had not been completed and returned to RTI prior to the scheduled visit.

The notes and general impressions gathered through interviews and observations at each site were presented in a written report for each project. These individual reports are confidential and were prepared only for internal use to provide background information for the RTI personnel assigned to analyze the ETS questionnaire data. These site visit reports are summarized in Chapter 2 of this report.

V. ETS CLIENT RECORD FORMS

A. Data Collection Procedures

The two major problems encountered in the process of completing the client record forms were: (1) the nebulous and varying definitions of ETS clients, and (2) inconsistencies in the extent and type of data kept within and across projects. Because of these problems, the original data collection procedures designed for the collection of ETS current client data had to be revised after the initial three site visits.

The basic strategy was to collect data from the client files on approximately 100 eligible current clients at each of 20 selected ETS projects. During the first three site visits, the population of current clients eligible to be selected was defined as follows: all clients who had had two or more contacts with ETS, one of which occurred during the period 1 July 1973 to 31 March 1974. (A contact could include individual contacts in person or by telephone, or small group contacts. Large group presentations were not allowable as contacts.) The above definition proved unworkable at the three projects because the project staff found the USOE definition of contacts and of eligibility to be too vague. Given these problems, the definition of eligibility was revised to the following: all clients who have had one or more official contacts during the period 1 July 1973 through 31 March 1974 and for whom a file has been established. This definition of eligibility for the sample was then used at the remaining 17 projects visited. Given the other limitations of these data, no further adjustments in the data because of this change in definitions were deemed necessary.

After the sample of client files was selected by the RTI site visit team, the relevant information from the client's file was then transferred to the Educational Talent Search Client Record Form. (See Appendix J for a copy of this form.) These forms were completed, one per client, on a total of 1,837 current clients. The strategy used in the first three visits involved collecting information only from the client file, and thus leaving blank any descriptive items in the form for which there were no corresponding file information. However, the files examined during the first visits evidenced scanty and inconsistent descriptive information on clients. The RTI project staff realized that the ability of the study to meet its descriptive objective would be seriously limited if only file data were used. Thus the data collection strategy was altered to include gathering information on each client from ETS staff. At each of the 17 remaining projects, data collectors transferred all possible information from the files to the form and then sat down with available staff members to fill in any missing client information. Given this change in data collection strategy, the RTI site visit team added information that had been collected verbally from the staff members at the three projects to the client descriptive data that had been collected from the project files. The client data form was revised to reflect whether the data source was a project file or a staff member.

B. Data Processing Procedures

Since descriptive information from the files on each client was transferred directly to the client record form by the RTI visitation team (this form had been designed to facilitate keypunching direct from the data), no intermediate coding forms were necessary. Manual edits were performed, however, on each client form. These edits included: checking to ensure that the correct control numbers were entered in each form; entering the sample weight for each client; and editing client forms for eligibility on certain information items. The latter edit refers to the process of determining whether a client, because of his or her education status at time of contact, was eligible for certain changes in status after ETS entry (e.g., a client who had already graduated from high school at time of contact would not be eligible for entry into a GED program and thus would be assigned a "Not Applicable" code on that item).

A data file on magnetic tape was created from the keypunched cards. Once the file was created, computer edit checks were conducted on the file to ensure the accuracy, completeness, and consistency of the file. These checks included:

1) An edit of control numbers necessary for the correct identification of records. These numbers include those which identify projects and those which identify clients within projects.
2) A check for values out of range. Every item on the questionnaire has a range of possible values that the coded response can assume. Examples of ranges which were checked include the sample weight ranges, the range of possible client ages, and the highest and lowest possible SAT score. The range of possible codes on each information item was checked.
3) A check for inconsistency of responses within a given client form. One example of inconsistency checks which were performed is the check to ensure that the current grade enrolled in at time of contact was not lower than the last grade completed at time of contact.

Errors identified as a result of the above were resolved by a return to the source document. In cases where inconsistencies could not be resolved by referring to the source document, the response was accepted as given. When inconsistencies could be resolved by referring to the source document, the record was changed to reflect the correct response.

VI. OE FORM 1227 AND 1974 AUDIT REPORTS

A. Data Collection and Follow-Up Procedures

In early October 1974, a letter was mailed to project directors of all 114 ETS projects requesting a copy of the project's report for the 1973-74 program year. This report, USOE Form 1227, provides detailed fiscal information about the project for the program year. In addition, the 20 projects which participated in the site visit component of the study were requested to send to RTI a copy of the latest audit report on the project's fiscal status, provided such an audit had been conducted in 1974. (A verbal request for this document was made at the time of the site visit.) A postage-paid envelope was provided with each letter.

In late November 1974, a follow-up effort was made through the 10 USOE regional offices to collect outstanding forms and reports. Each regional TRIO senior program officer was contacted by telephone and was given a list of nonresponding projects in his region. The senior program officer was requested to contact the projects to urge cooperation with the request for the forms and reports. It was not possible, however, to collect a copy of USOE Form 1227 for all 114 projects because they were either not available or were still in preparation at some of the projects in late November. In addition, it was not possible to collect 1974 audit reports from all of the 20 projects receiving a site visit because some projects indicated that such a report was not available.

Response rates for these two documents were as follows:

1) ETS projects returned 78 of 114 of the USOE 1227 forms, giving a response rate of 68 percent.
2) ETS projects provided RTI with 12 of 20 of the 1974 audit reports, giving a response rate of 60 percent.

B. Data Processing Procedures

Upon receipt of each Form 1227 at RTI, the following data were transferred from the form to a Data Summary Form:

1) Project code number.

2) Cumulative federal funds expended during the grant period for:
   - a) Total personnel costs.
   - b) Total non-personnel costs.
   - c) Indirect costs.
   - d) Total costs.

3) Cumulative non-federal funds expended during the grant period for:
   - a) Total personnel costs.
   - b) Total non-personnel costs.
   - c) Indirect costs.
   - d) Total costs.

The cumulative expenditures, by cost category, were compared with the total approved budget, by cost category, to verify that no extreme differences existed between the two values.

Though each ETS project was asked for USOE Form 1227, the 1974 audit reports were only requested from the site visited projects. These documents were used primarily to substantiate and support the 1227 figures for the 12 of the 20 site-visited projects from which they were returned. Beyond this validation the audit data did not serve any other function.

The above data for each Form 1227, received by 1 February 1974, were then transferred to coding forms from which computer cards were keypunched. The data were then entered into an existing cost analysis data file. A listing of the data from this file was compared with the data on the Data Summary Form to correct any errors committed during transmittal from the summary form to cards to the file on magnetic tape, which in turn constituted the data base for conducting a cost analysis of the ETS projects.

VII. USOE FORM 1231

A. Data Collection Procedures

The ETS USOE Form 1231 Final Statistical Report--1 July 1973 to 30 June 1974--was used to provide certain supplementary information on the 105 projects that returned a project questionnaire. This information consisted of the number of clients served, the number of clients who began studies at a postsecondary institution, and the number of clients who received adequate aid. The 1231 information also provided the same data for the nine projects that did not return a project director questionnaire. In addition, the USOE Form 1231 was used to obtain certain key information for nonresponding projects that was collected from responding projects through the project director questionnaire; i.e., the ethnicity of the majority of project clients and the location of the majority of clients served.

B. Data Processing Procedures and Data Use

Different methods were used in processing the USOE Form 1231 data from responding and nonresponding projects. Data collected from the 105 responding projects were coded manually in conjunction with information from the ETS staff questionnaires and was therefore subject to the same data processing procedures (see II.A.3). This information was later used to classify projects by size and by the number of clients who began studies at a postsecondary institution for cross-tabulation purposes.

USOE Form 1231 data collected for the nine nonresponding projects was not coded but was used to provide a brief description of these projects by the number of clients served, by the ethnicity of their client majority, and by the location of the majority of clients served.

Appendix F

Talent Search Site Visit Protocol

TALENT SEARCH SITE VISIT PROTOCOL

Site visits are planned at 20 TS locations, in the period April-June 1974. There are two major purposes of these visits: (1) to study project records in order to describe the TS student population, the kinds of services provided to them, and rates of enrollment in postsecondary institutions, and (2) to study the dynamics of TS program implementation and operation.

Purpose (1) should be expanded upon. There is at present virtually no information of a comprehensive sort about the number and kinds of services which individual students actually receive in TS or the number of contacts made with students. And while entry rates of clients into postsecondary institutions and job-training programs are reported, these have not been systematically related to client types (age, length of TS participation, ethnic/racial background, scholastic record, etc.) or to types of TS services received. Whatever records are kept at project sites would be studied and abstracted for those purposes (and recorded as outlined in the record-form); this would be done for a sample of 100 students at a given site, for the period from July 1, 1973, to date of visit. Purpose (1) is of the higher priority in the site visits, and arrangements will be made to have project records accessible for careful study.

Purpose (2) may also be amplified. Since virtually no systematic descriptive data exist concerning the operation of Talent Search projects, it is important to discover HOW basic program functions are carried out: recruitment of students, services provided to students, follow-up procedures with students, coordination with postsecondary institutions, and utilization of community resources. At the same time, projects may be further described by examining project management and strategies, accomplishments and problems, evaluation engaged in, staff functions, major outcome of the site visits should be a first-hand and realistic description of TS projects in terms of variations encountered, program flexibility, factors which appear to affect day-to-day operations, and thus, the beginnings of a national profile of program implementation.

Thus, purpose (1) will be approached formally through the use of structured record forms for encoding project and student data, while purpose (2) will be carried out informally through a series of interviews and observations. The outlines for interview content and observation possibilities are fairly complete, but will be followed only as time permits, with emphasis on the priority topics and functions, and further emphasis on interview over observation. In addition, the site visit will provide an opportunity to clarify or amplify certain key information provided in questionnaires earlier returned to RTI. These questionnaires will be mailed to the projects at least a month in advance of the scheduled visit. This will have an additional advantage where questionnaire data are incomplete or suggest unusual or unique practices and problems.

Interview findings will be summarized as outlined in the accompanying report-forms, but will also be expressed in narrative form in order to cover the range of major topics and observations. Interview and observation findings will not be used as a separate set of data to be analyzed and reported, but rather will be used to help in the interpretation of the overall TS study and in description of TS as a program. In addition to narrative summaries for the major interview topics, there will be an "environmental" description, including location, atmosphere, space, status of files, busyness, facilities, availability of materials, and so on.

Talent Search Site Visit Report Form

TS-ID# ____

A. Project Name ____

B. Location ____ (City) ____ (State) HEW Region ____

C. Interviewer ____

D. Visit Dates ____ 1974

E. Record-Reviewers: 1. ____ 2. ____

F. Interviews were conducted with all of the following. To the left indicate how many in each category were contacted in toto. To the right, show approximate total length of time with that category.

N	Category	Time	N	Category	Time
____	Project Director	____	____	Recruiter	____
____	Assistant Project Director	____	____	Recruiter/Counselor	____
____	Coordinator	____	____	Assistant Recruiter	____
____	Counselor (Professional)	____	____	Assistant Counselor	____
____	Tutor	____			
____	Counselor (Student)	____	____	OTHER: ____	____
____	Institutional Rep.	____			
____	Agency Representative	____	____	OTHER: ____	____
____	Chairman, Board Directors	____	____	OTHER: ____	____
____	Member, Board Directors	____			

G. When did this TS project begin here? ____, 19____

H. Among those interviewed, persons in the following categories had completed the earlier RTI Questionnaires:

____ ____ ____

Note here any notable reactions to those questionnaires:

____

____

I. Nature of observations made. Indicate activity and length of time.

Check		Time	Check		Time
____	Orientation of student group		____	Staff meeting	____
____	Initial student interview	____	____	Counseling student	____
____	Tutoring session	____	____	Board of Directors Mtg.	____
____	Informal rap session	____	____	Meeting with community agency	____
____	Project social activity	____	____	Cultural activity	____
____	Remedial class	____	____	Crisis situation	____
____	OTHER ____	____	____	OTHER ____	____

J. List any relevant project materials either studied or acquired (excluding project records being reviewed and noted during visit).

____ Project newsletter
____ Orientation folder for students
____ Materials on postsecondary opportunities, admission, financial aid, etc.
____ Staff minutes or agendas

____ Project log
____ Form letters
____ Feedback reports to TRIO
____ Other ____
____ Other ____

TALENT SEARCH SITE VISITS
Major Topical Areas to be Covered in Interviews

Respondent *
Categories

1, 5, 6 — I Adherence to DSA guidelines re overall program
- A. Criteria for selection of clients
- B. Joint application and operation (agency and target community)
- C. Board composition (1/3 target community, 1/3 target students, 1/3 educational community)
- D. Periodic change of staff

1, 2, 5, 6 — II Communications with TRIO-PO, institutions, Board of Directors, students, high schools, community groups
- A. Assistance received in problem-solving
- B. Feedback to Board, TRIO, high schools
- C. General level of interaction and mutual support

1, 2, 3, 4 — III Program accomplishments and problems
- A. Overall program: follows intended plans and fulfills them
- B. Students: completion of high school
  entry into post-secondary education and retention
  apparent gains in skills
- C. Problem areas
- D. Unexpected consequences, positive or negative
- E. Activities that are of most & least value to program success

1, 4, 6 — IV Recruitment strategies
- A. Criteria employed; definition of "exceptional talent"
- B. In high school and out-of-school clients: how identified
- C. Strategies in initial contacts

1, 2, 3, 4 — V Services to students
- A. Training and assistance: health, classes, tutoring, cultural, counseling
- B. Post-secondary placement: information, visits, application, selection, financial aid, enrollment, TRIO participation
- C. Job placement during TS; on-the-job training; enrollment in ACTION programs

1, 5, 6 — VI Overall program and management
- A. Maintainence of center, office hours, travel, records
- B. Selection of staff, staff interaction, program planning
- C. Board of Directors: functions, value (integral or advisory?)
- D. Project finances and budgets
- E. Project self-evaluation

1, 2, 3, 4 — VII Follow-up procedures
- A. After first contacts (to aid, counsel, encourage, tutor)
- B. Maintain regular contact? How frequent?
- C. In high school: to assist, check on retention
- D. On the campus: 1) to assist in first months on campus
  2) to check on progress, retention, status

1 - 6 — VIII Areas of concern and reaction, and recommendations
Project staff, Board, Institutional Rep.

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* Respondent Categories:
1. Project Director (or Asst.)
2. Professional counselor
3. Tutor
4. Recruiter
5. Agency/Institutional Rep.
6. Board of Directors

TALENT SEARCH SITE VISITS

Operational Plans for 20 Site Visits

One interviewer will visit each site for 1-1/2 days of interviewing and observation. In smaller projects, one day might suffice. For certain projects, a consultant of appropriate ethnic/racial background will conduct the visit.

One or two record-reviewers (depending on project size) for 1-1/2 days. They will study both the existing summaries of student records (from July 1, 1973 to date of visit), and also a sample of 100 individual student records. They will talk with person PD specifies, to get overview of records system, codes used, etc.

Time and effort emphasis will be on the review of records. However, the interviewer will use full 1-1/2 days as intended (to interview and observe); the chart below indicates priorities among potential interviewees. Attention will be given first to interviewing, and then to observation.

Visits scheduled during the week, or on Saturday if project director indicates full project functioning on Saturday.

Project Director will be contacted in advance to set up interview schedule and arrange space for study of records.

Category of Interviewee	N	Priority	Total Time Estimated for Category	Interviewer Time
1. Project Director or Asst. Project Director	1	*	2	
2. Coordinator	1		1/2	
3. Professional Counselor or Asst. Counselor	1	*	1 -	
4. Student Counselor	2		1/2	
5. Tutor	2	*	1/2	
6. Recruiter or Asst. Recruiter	2	*	1	
7. Institutional or Agency Representative	1	*	1	
8. Chairman, Board of Directors or Member of Board	1	*	1	
8 Categories	11 interviewees		7 1/2 hours of personnel time.	7 1/2 maximum
Time estimated for travel "within" project				1 1/2
Time for clarifying notes, collating responses				2
Time for observation of TS activities (maximum)				2
TOTAL				13

Appendix G

Talent Search Project Director Questionnaire

RESEARCH TRIANGLE INSTITUTE
POST OFFICE BOX 12194
RESEARCH TRIANGLE PARK, NORTH CAROLINA 27709

CENTER FOR EDUCATIONAL RESEARCH AND EVALUATION

Dear Talent Search Project Director:

Enclosed are three questionnaires that have been designed to solicit information about your Talent Search project: (1) a Talent Search Project Director Questionnaire; (2) a Talent Search Counselor Questionnaire; and (3) a Talent Search Advisory Council Chairperson Questionnaire. These questionnaires are being mailed to all Talent Search projects as a part of a nationwide study of the Talent Search program being conducted by the Research Triangle Institute of North Carolina, under contract to the U. S. Office of Education. We hope that you are familiar with this study through our previous communications with your project.

The purpose of the Project Director Questionnaire is to provide, on a nationwide basis, a general description of the Talent Search program in terms of such factors as:

1) Project Director's background and philosophy.
2) Program recruitment and selection strategies.
3) Program goals, processes, special features, and emphasis.
4) General characteristics of clientele served.
5) Program accomplishments.
6) Special difficulties and problems encountered by the project.
7) Budgetary information to include program costs and patterns of funding from sources other than USOE.
8) Staffing patterns.
9) Advisory Board responsibilities, operations, and contributions.
10) Degree and nature of community support and cooperation.
11) Degree and nature of postsecondary institution support.
12) Degree of cooperation between and relationship with other programs, including those conducted by the host TS agency or institution.
13) Suggestions for improving TS programs.
14) Type of data collected and maintained on clients.
15) Characteristics and activities of the sponsoring agency.

You are asked to fill out this questionnaire and to return it to RTI in the enclosed self-addressed envelope. You will note that several questions in the Project Director Questionnaire relate to various project services that are provided by Federal and/or non-Federal funds. These questions are not intended as an audit of the use of Federal funds. Rather, they are designed to provide a complete description of the types of services being provided through the use of both Federal and non-Federal funds by Talent Search projects throughout the nation.

(919) 549-8311 FROM RALEIGH, DURHAM AND CHAPEL HILL

The second questionnaire, the Talent Search Counselor Questionnaire, is designed to provide descriptive information about the project's guidance and counseling activities. Consequently, the questionnaire should be completed by the person most knowledgeable in this area. That person might be yourself, your senior counselor, or another staff member of your choice. Please forward this questionnaire, along with a self-addressed envelope, to the person most knowledgeable about counseling in your project.

The third questionnaire, the Talent Search Advisory Council Chairperson Questionnaire, addresses the nature and scope of the council's involvement in the program. This questionnaire is to be completed by the chairperson of your advisory council. You are therefore requested to forward this questionnaire and one of the self-addressed envelopes to the chairperson.

Each person completing a questionnaire is requested to return the questionnaire directly to RTI, using one of the three postage-paid self-addressed envelopes enclosed.

All answers to these questionnaires will be held in strictest confidence. The answers will never be identified with you or your project in any way, and no one from Talent Search or the U. S. Office of Education will ever see them. The code number on each questionnaire serves as identifying information. This code number will be placed on the computer data tapes and will allow the research staff to put together (by computer) the answers to those questionnaires related to the same project. The only key to the code numbers will be kept in locked storage by RTI and will not be accessible to anyone except to the RTI research staff for research requirements only.

Reports of the study will never identify any individual project or person nor will they provide any data that would allow the identity of any individual project or person to be inferred. The reports will describe groups of students or groups of projects--for example, projects with primarily urban students, or projects whose students are primarily black.

We believe that this initial study of the Talent Search project will document the ways in which Talent Search is helping students and will suggest ways in which it may better serve them. We thank you very much for participating in the study.

Sincerely,

John N Pyecha

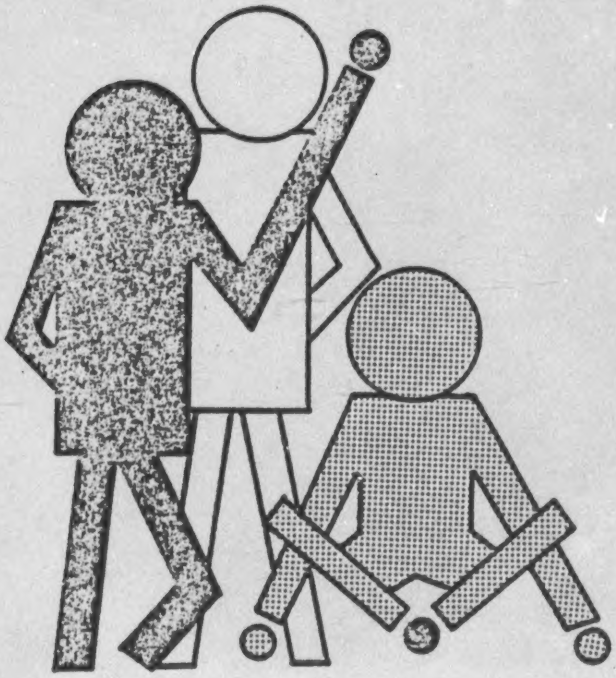
John N. Pyecha
Project Director

JNP:ls

O.M.B. No. 51-S74016
Approval Expires 12-31-74

TALENT SEARCH

PROJECT DIRECTOR QUESTIONNAIRE



OE-321

TALENT SEARCH PROJECT DIRECTOR QUESTIONNAIRE

The purpose of this questionnaire is to obtain a description of your Talent Search project, including a description of its staff, students, and emphases. UNLESS OTHERWISE STATED, ALL ITEMS ARE DIRECTED TO PROJECT ACTIVITIES FOR THE CURRENT FISCAL YEAR (1 July 1973 to 30 June 1974). All responses will remain confidential in that individual projects or personnel will not be identified.

1. How long has this TS project been in existence? ________ (Years) ________ (Months)

2.a. How long have you served as director of this Talent Search project, another Talent Search project, an Upward Bound project, or other projects serving disadvantaged youth?

(Circle one number in each column)

	This TS project	Another TS project	An UB project	Other project(s) serving disadvantaged youth
Never	1	1	1	1
Less than 1 year	2	2	2	2
1 year	3	3	3	3
2 years	4	4	4	4
3 years	5	5	5	5
4 years	6	6	6	6
5 years or more	7	7	7	7

2.b. How long have you served in some other capacity in this Talent Search project, another Talent Search project, an Upward Bound project, or other projects serving disadvantaged youth?

(Circle one number in each column)

	This TS project	Another TS project	An UB project	Other project(s) serving disadvantaged youth
Never	1	1	1	1
Less than 1 year	2	2	2	2
1 year	3	3	3	3
2 years	4	4	4	4
3 years	5	5	5	5
4 years	6	6	6	6
5 years or more	7	7	7	7

3.a. What is your sex?

(Circle one)

Male	1
Female	2

b. How old were you on your last birthday?

(Circle one)

25 or younger	1
26 to 35	2
36 to 45	3
46 to 55	4
56 to 65	5
66 or older	6

4. How do you describe yourself?

(Circle one)

Native American or American Indian	1
Black or Afro-American or Negro	2
Spanish-speaking origins	
Mexican American or Chicano	3
Puerto Rican	4
Other Spanish-speaking origins (specify ________________)	5
Oriental or Asian-American	6
White or Caucasian	7
Other (specify ________________________________)	8

5. What languages other than English do you speak fluently?

(Circle all that apply)

None	1
Spanish	2
Chinese	3
Japanese	4
American Indian language(s)	5
Other(s) (specify ________________________________)	6

6. In what type of community have you spent most of your life through high school and since high school? (Give your best estimate if you are not sure.)

(Circle one number in each column)

	Through High School	Since High School
In a reservation	1	1
In a rural or farming community	2	2
In a small city or town of fewer than 50,000 people that was not a suburb	3	3
In a medium sized city (50,000 to 100,000 people)	4	4
In a suburb of a medium sized city	5	5
In a large city (100,000 to 500,000 people)	6	6
In a suburb of a large city	7	7
In a very large city (over 500,000 people)	8	8
In a suburb of a very large city	9	9

7. What college degrees do you hold? Do not report honorary degrees.

(Circle all that apply)

A degree or diploma based on less than 4 years' work	1
A bachelor's degree	2
A master's degree	3
A professional or specialist diploma (sixth year)	4
A doctor's degree	5

8. Are you currently enrolled in a degree program?

(Circle one)

Yes	1
No	2

9. Are you eligible for any retirement benefits?

(Circle one)

Yes	1
No	2

10.a. Have you ever attended any training institutes or comparable programs that offer special training in teaching or counseling "disadvantaged" students? (Do not include annual meetings of professional associations or national or regional meetings of Talent Search Project Directors, etc.)

(Circle one)

No	1	→ (SKIP TO Q. 11.a)
Yes, one	2	(CONTINUE WITH Q. 10.b)
Yes, two or more	3	

b. For how long did you attend these training institutes or programs? (Fill in number of days for a maximum of three programs; if you attended more than three, indicate the three longest ones.)

Program one lasted _________ days.
Program two lasted _________ days.
Program three lasted _________ days.

11.a. Does the institution or agency sponsoring your program administer any of the programs for the disadvantaged listed below? If so, please indicate the degree of cooperation existing between your program and each listed program.

(Circle one number on each line)

	My sponsor does not administer	MY SPONSOR DOES ADMINISTER AND DEGREE OF COOPERATION IS:				
		Very low	Low	Moderate	High	Very high
Upward Bound	1	2	3	4	5	6
Special Services	1	2	3	4	5	6
Other federal programs for the disadvantaged	1	2	3	4	5	6
Non-federal programs for the disadvantaged	1	2	3	4	5	6

b. If you desire a higher degree of cooperation with any of the programs listed in 11.a, how do you think the cooperation could be improved? (List below the program name beside your suggestions for increasing cooperation with that program.)

PROGRAM NAME	SUGGESTIONS
(1)__________	__________ __________
(2)__________	__________ __________
(3)__________	__________ __________
(4)__________	__________ __________

12. What type of institution or agency sponsors your project?

(Circle one)

Public educational institution	1	(CONTINUE WITH Q. 13)
Private educational institution	2	
Consortium of educational institutions	3	(SKIP TO Q. 14.a)
Agency for a consortium	4	
Private/nonprofit agency	5	
Public agency (e.g., city, county, or state)	6	
Other (specify ____________________)	7	

13. Is the educational institution sponsoring your project a:

(Circle one)

Secondary school	1
Two-year college	2
Four-year college	3
Vocational/technical school	4
Other (specify ____________________)	5

14.a. Are you a faculty member at the institution sponsoring this Talent Search Project?

(Circle one)

Not applicable	1	(SKIP TO Q. 14.d)
No	2	
Yes	3 →	(CONTINUE WITH Q. 14.b)

b. What is your academic rank at this institution?

(Circle one)

Instructor	1
Assistant Professor	2
Associate Professor	3
Professor	4
Other (specify ____________________)	5

14.c. Do you have tenure at this institution?

	(Circle one)
Yes	1
No	2

d. What is the title of the position of your immediate supervisor at this institution or agency?

(Write in): ______________________________

e. Do you serve on any of the host institution's planning or advisory committees?

	(Circle one)
No	1
Yes, one such committee	2
Yes, two or more such committees	3

f. Do you have an administrative appointment at this institution?

	(Circle one)
Department Head	1
Assistant Department Head	2
Associate Dean	3
Assistant Dean	4
No administrative appointment	5
Other (specify ______________________________)	6

15.a. How many members are on your project's Board of Directors (Advisory Board/ Advisory Committee)? __________

b. Indicate the composition of the board by giving the number of members representing each of the following groups:

	Number of Members
Sponsoring institution or agency	__________
Target community members	__________
Talent Search clients (present or former)	__________
Businessmen and professionals	__________
Financial aid or admissions officers	__________
Other educators	__________
Other groups (specify: a. ______________________ .	__________
b. ______________________ .	__________

16.a. Are there regularly scheduled meetings of the Board/Committee?

	(Circle one)
Yes	1 → (CONTINUE WITH Q. 16.b)
No	2 → (SKIP TO Q. 16.c)

b. How often is the Advisory Board/Advisory Committee regularly scheduled to meet during the 1973 fiscal year?

	(Circle one)
Monthly	1
Quarterly	2
Five times per year	3
Other (specify ____) .	4

c. Approximately how often does the Advisory Board/Advisory Committee have unscheduled meetings? __________ per year.

17. (1) Please check (✓) in Column A those responsibilities which were mandated to the Board/Committee. (2) For every activity (mandated or unmandated), please rate in Column B the degree of influence which you feel the Board/Committee has had on the activity. (3) Please rate in Column C the level of influence you feel the Board/Committee should have on each activity.

Column A		Column B				Column C			
		PRESENT INFLUENCE				DESIRED LEVEL OF INFLUENCE			
Check Here If Mandated		None	Very Little	Some	Very Much	None	Very Little	Some	Very Much
____	Designing program goals	1	2	3	4	1	2	3	4
____	Developing project proposal	1	2	3	4	1	2	3	4
____	Selecting project director	1	2	3	4	1	2	3	4
____	Hiring project staff	1	2	3	4	1	2	3	4
____	Raising additional funds	1	2	3	4	1	2	3	4
____	Recruiting volunteer services	1	2	3	4	1	2	3	4
____	Promoting target community involvement	1	2	3	4	1	2	3	4
____	Coordinating activities with other institutions and organizations (e.g., UB, SSDS, Job Corps, etc.)	1	2	3	4	1	2	3	4
____	Sensitizing educational institutions as to the needs of disadvantaged students	1	2	3	4	1	2	3	4
____	Evaluating project staff	1	2	3	4	1	2	3	4
____	Evaluating overall project performance	1	2	3	4	1	2	3	4
____	Approving program modifications	1	2	3	4	1	2	3	4

18. Which of the following best describes the relationship between the Project Director and the Advisory Board/Advisory Committee?

	(Circle one)
Project Director is accountable to the Board/Committee	1
Board/Committee is accountable to the Project Director	2
Board/Committee serves in an advisory role to the Project Director	3

B. Program Design and Content

19. OE defines a client on OE Form 1231 as:

> "An individual who has received two or more personal contacts of sustained counsel by the project director or his representative."

a. How do you define a client when filling out the OE Form 1231? If your definition is based on having a specific number of contacts, please indicate the number of contacts required and what constitutes a contact (e.g., presentations to groups of students, telephone calls to individual students, letters written to students or institutions, etc.).

____

____

____

b. What definition of a client would you recommend that OE adopt for reporting purposes?

____

____

____

> NOTE: IN ALL THE FOLLOWING QUESTIONS THAT REFER TO YOUR PROJECT'S CLIENTS PLEASE USE THE DEFINITION OF A CLIENT WHICH APPEARS ON OE FORM 1231.

20.a. Are you satisfied with OE guidelines that define the TS target population?

(Circle one)

Yes . . . . 1 → (SKIP TO Q. 21)

No . . . . 2 → (CONTINUE WITH Q. 20.b)

b. What guidelines for defining the TS target population would you recommend that OE adopt?

____

____

____

____

21. Approximately what percent of the clients from your project who enrolled in postsecondary institutions over the past two years (or past year if project was not in existence for two years) have enrolled in the following types of institutions? (Percents must total 100.)

	Percent
A four-year institution	______
A junior college or other two-year institution	______
A trade, vocational, technical, business or other career training school	______
Other (specify ______________________________) .	______
TOTAL	100 %

22. Estimate for the period beginning July 1, 1973, the percent of your clients who enter your program by the means listed below. (Percents should total 100.)

	Percent
Actively recruited by your project	______
Referred by other federal or non-federal programs	______
Referred by community organizations	______
Referred by former clients	______
Referred by school personnel	______
Unreferred drop ins	______
Referred by other (specify ______________________________) .	______
TOTAL	100 %

23. List no more than five specific criteria used by your project to determine a client's "exceptional potential for postsecondary training" and indicate the importance of each criterion, using a "1" for the most important, a "2" for the next important, etc. Please be specific.

Criteria	Rank
a) ______________________________ ______________________________	___
b) ______________________________ ______________________________	___
c) ______________________________ ______________________________	___
d) ______________________________ ______________________________	___
e) ______________________________ ______________________________	___

24.a. What percent of your project effort is expended on each of the following activities? (Percents must total 100.)

	Percent
Recruitment	______
Community activity	______
Direct student service	______
Efforts to improve the quality of educational opportunities	______
Administration	______
Other activities	______
TOTAL	100 %

b. Below is a list of specific activities that fall under each of the general areas of activity mentioned in 24.a. Please check, in Column 1, each activity engaged in by your project. Also, within each general category please use Column 2 to rank the specific activities engaged in by your project as to level of effort expended. Place a "1" by the activity receiving the greatest level of effort, a "2" by the activity receiving the second greatest level of effort, etc.

	Column 1 Check (✓) Activities Engaged in by Your Project	Column 2 Rank Level of Effort
(1) RECRUITMENT		(Rank All)
Field work with schools to identify students who can benefit from Talent Search	______	______
Field work with community agencies to identify students who can benefit from Talent Search .	______	______
"On the street" types of activities designed to contact students who can benefit from Talent Search	______	______
Serving "walk ins" at project office for initial contact	______	______
(2) COMMUNITY ACTIVITY		(Rank All)
Making home contacts designed to help parents encourage their children to increase their educational aspirations	______	______
Working with community agencies to identify resources that will be useful to students who need assistance in order to begin or continue their education	______	______
Attending meetings in and of the community to provide information and encouragement about postsecondary education	______	______

24.b. (Continued)

(3) DIRECT STUDENT SERVICES	Column 1 Check (✓) Activities Engaged in by Your Project	Column 2 Rank Level of Effort (In Category (3) Rank only the top 5)
Formal counseling sessions		
Tutoring or conducting courses in basic academic skills		
Informal "rap sessions" with students about their concerns		
Writing letters to promising students to encourage them to pursue additional education		
Making phone calls to students encouraging them to pursue additional education		
Crises intervention in such areas as drug abuse, or when clients become involved with law enforcement personnel, etc.		
Conducting or providing social activities for clients served by the program		
Conducting or providing cultural activities for clients served by the program		
Establishing contacts with colleges and universities for students		
Assisting students to gain reentry to high school		
Assisting dropouts to find alternative paths to a high school diploma such as taking the G.E.D. or home study		
Follow-up activities on former clients		
Bringing admission officers to project for student interviews		
Providing admission and financial aid information		
Assistance in completing admission and financial aid forms		
Obtaining services for students, e.g., part-time employment, social security benefits, etc.		
Assisting students to gain reentry to post-secondary education		
Field trips to postsecondary institutions . . .		
Other (specify ____________________) .		

24.b. (Continued)

	Column 1 Check (✓) Activities Engaged in by Your Project	Column 2 Rank Level of Effort
(4) EFFORTS TO IMPROVE QUALITY OF EDUCATIONAL OPPORTUNITY		(Rank All)
Community service and organizational activity (work with public schools, foundations, school committees, service clubs, etc.) . . .		
Work with state and national education associations such as CEEB, NASFAA, APGA, ACAC, etc.)		
Work with postsecondary educational institutions to improve number and quality (climate) of educational opportunities . . .		
Work with other agencies, public and private, to develop additional resources needed by students (e.g., banks, state scholarship commissions, welfare commission, and legislatures)		
Work to improve national impact of the program such as consulting to regional and national offices of OE, Research Triangle Institute, etc.		
(5) ADMINISTRATIVE		(Rank All)
Staff development including selection and training		
Planning, implementation and evaluation, both fiscal and program		
Record keeping, report preparation, data collection		
Public relations and information		
Work with Advisory Committee		
Fund raising		
(6) OTHER ACTIVITIES (PLEASE SPECIFY)		(Rank All)
. .		
. .		
. .		

25. Listed below are several services. Please indicate for each whether or not it is provided by your project and, if it is provided, rate the degree to which it is emphasized in your project.

(Circle one number on each line)

	Service is not provided	SERVICE IS PROVIDED AND IS GIVEN:		
		little emphasis	moderate emphasis	much emphasis
a. Organized services for:				
Reading	1	2	3	4
Remedial English	1	2	3	4
Other English Courses	1	2	3	4
Remedial Mathematics	1	2	3	4
Other Mathematics	1	2	3	4
Heritage of minority groups	1	2	3	4
Social sciences courses (such as psychology, sociology, history, etc.)	1	2	3	4
Foreign language courses	1	2	3	4
Special interest courses (such as photography, hot rod, etc.)	1	2	3	4
Taking tests preparing for college examinations (such as SAT or ACT)	1	2	3	4
Learning how to study	1	2	3	4
Tutoring by professional teachers and counselors	1	2	3	4
Tutoring by college students	1	2	3	4
Tutoring by other students in your program	1	2	3	4

25. (Continued)

(Circle one number on each line)

	Service is not provided	SERVICE IS PROVIDED AND IS GIVEN: little emphasis	moderate emphasis	much emphasis
b. Counseling and Other Help				
Individual counseling on personal problems (such as family problems, boy-girl relations, family finances, drugs, etc.)	1	2	3	4
Counseling on vocation or career best suited to student's abilities and interests	1	2	3	4
Counseling on academic problems	1	2	3	4
Visits to one or more colleges or other schools	1	2	3	4
Information and counseling about requirements and costs of college or other types of school	1	2	3	4
Help in choosing a college or vocational/technical school	1	2	3	4
Help in applying to college or vocational/technical school	1	2	3	4
Information and counseling about financial aid for colleges or other types of schools	1	2	3	4
Help in applying for financial aid	1	2	3	4
Help in finding jobs	1	2	3	4
c. Provide Activities in:				
Sports	1	2	3	4
Social gatherings	1	2	3	4
Cultural activities (such as exh[illegible], field trips, spe[illegible]s, etc.)	1	2	3	4

26. Does your project, on a regular and routine basis, perform the following functions for those clients admitted to an educational program? If your answer is no, indicate if it is "no" because you feel the activity is very important but you do not have required resources; or if the answer is "no" because you feel that the activity is not worthwhile for the resources required.

(Circle one number on each line)

		NO, BECAUSE:	
	Yes	Very important but lack necessary resources	Not worth required resources
Check to see if client actually entered the institution	1	2	3
Check to see if he obtains financial aid	1	2	3
Notify the institution's Special Service Director of client's arrival and needs	1	2	3
Make one check to see how client is doing during first year in program	1	2	3
Make two or more checks on client during first year in program	1	2	3
Check on client after first year	1	2	3
Other(s) specify: a.__________	1	2	3
b.__________	1	2	3

27.a. Does your project regularly (at least annually) conduct a follow-up of former clients?

(Circle one)

Yes . . . . 1 → (SKIP TO Q.28.a)
No . . . . 2 → (CONTINUE WITH Q. 27.b)

b. If your answer to Q. 27.a is "no," has your project ever conducted a follow-up of former clients?

(Circle one)

Yes . . . . 1 → (CONTINUE WITH Q. 27.c)
No . . . . 2 → (SKIP TO Q. 28.a

c. If your answer to Q. 27.b is "yes," in which year was this follow-up conducted?

____

d. For which program years were clients included? __________ to __________

e. Indicate the number and percent of former clients for which the desired follow-up information was obtained.

Number of clients: __________
Percent of clients: __________

f. Is a report of this follow-up study available?

(Circle one)

Yes . . . . 1 → (SEE BOX BELOW)
No . . . . 2 → (SKIP TO Q. 28.a

NOTE: PLEASE ENCLOSE A COPY OF THIS REPORT WHEN YOU RETURN YOUR QUESTIONNAIRE TO THE RESEARCH TRIANGLE INSTITUTE.

28.a. Please supply the following information for all staff working with this project in the current fiscal year (1 July 1973 - 30 June 1974). IMPORTANT: Refer to the TRIO Application Form (OE Form 1251), XIII. Budget Instructions (page 5), for guidance in answering this question. Note, however, that the information requested below (1) concerns the actual, NOT the projected, numbers of personnel working in your project; and (2) includes personnel whose salaries are paid by both federal and non-federal sources.

	PERSONNEL SUPPORTED BY FEDERAL FUNDS				PERSONNEL SUPPORTED BY NON-FEDERAL FUNDS			
	Number of Persons	Full-time Equivalent Salary Per Month*	Percent of Time*	Number of Months Employed*	Number of Persons	Full-time Equivalent Salary Per Month*	Percent of Time*	Number of Months Employed*
Project Director								
Assistant Director								
Tutors								
Counselors								
Tutors-Counselors								
Recruiters								
Researchers/Evaluators . .								
Secretarial/Clerical . . .								
Student Help								
Other(s) (specify):								
. .								
. .								
. .								

* If there are more than one person in a position type, enter average.

28.b. Of your total staff how many work full-time and how many work part-time?

Number of full-time staff members ________

Number of part-time staff members ________

29.a. Has your project provided inservice training to project staff members since 1 July 1973?

(Circle one)

Yes . . . . 1 → (CONTINUE WITH Q. 29.b)

No . . . . 2 → (SKIP TO Q. 30.a)

b. For each of the categories listed below, write in the number of persons to whom inservice training was provided and the number of hours per year allotted for the training. Also for each of the listed categories, circle a "1" or "2" or both to indicate whether federal or non-federal funds or both are used to support the training. (If training is not provided in an area, enter "none" under "Number of Persons.")

	(Write in:)		(Circle all that apply on each line)	
			SUPPORTED BY:	
	Number of Persons	Total Number or Hours/Year	Federal Funds	Non-Federal Funds
Counseling techniques	____	____	1	2
Identification of resources . .	____	____	1	2
Dropout prevention	____	____	1	2
Diagnosis of student problems .	____	____	1	2
Use of equipment or materials .	____	____	1	2
Administrative or management techniques	____	____	1	2
Others (specify):				
____________________ . .	____	____	1	2
____________________ . .	____	____	1	2

30.a. What are the total costs (including both federal costs and non-federal cash and contributions) of your Talent Search program as budgeted for the period 1 July 1973 to 30 June 1974? (Include budget revisions to date.) Please indicate personnel, non-personnel, and indirect costs borne by each of the major sources of funding listed below. (If a source is not used for a type of cost, write in "none.")

	A Personnel Costs	B Nonpersonnel Costs	C Indirect Costs
OE Talent Search Funds	$______	$______	$______
Other Federal Funds	$______	$______	$______
Foundation or Corporation Funds	$______	$______	$______
State Funds	$______	$______	$______
Local Funds	$______	$______	$______
Private Donations	$______	$______	$______
Other ____________________ . .	$______	$______	$______
TOTALS	$______ Sum Col. A	$______ Sum Col. B	$______ Sum Col. C

Total Personnel Costs (Sum of Col. A) . . . . $______

Total Nonpersonnel Costs (Sum of Col. B) . . . . $______

Total Direct Costs (Sum of Cols. A and B) . . . . $______

Total Indirect Costs (Sum of Col. C) . . . . $______

Total Costs (Sum of Cols. A and B and C) . . . . $______

b. Please estimate the contributions (in dollars) from all non-federal sources for the period 1 July 1973 - 30 June 1974. (Exclude any waived fees covered in Q. 30.c below.)

	Period 1 July 1973 - 30 June 1974
Total Contribution	$________
Source of Contributions:	
Cash	$________
In-Kind:	
Personnel	$________
Facilities	$________
Other	$________

c. Please estimate the total value of any postsecondary registration or application fees or of any standardized test fees that have been (or will be) waived for clients through the efforts of your project for the period 1 July 1973 - 30 June 1974. . . . . $________

C. Student Data

31.a. With respect to the target population being served, does your project operate:

(Circle one number on each line)

	Yes	No
Citywide	1	2
Countywide	1	2
Statewide	1	2
Regionwide	1	2

b. What percent of your project's clients come from the following locations? (Percents should total 100.)

	Percent
A reservation	______
A rural or farming community	______
A small city or town of fewer than 50,000 people that was not a suburb	______
A medium-sized city (50,000 to 100,000 people)	______
A suburb of a medium-sized city	______
A large city (100,000 to 500,000 people)	______
A suburb of a large city	______
A very large city (over 500,000 people)	______
A suburb of a very large city	______
TOTAL	100 %

32. Estimate the percent of your clients since 1 July 1973 in each of the following categories. (Percents shoudl total 100).

	Percent
7th - 8th graders	
9th - 10th graders	
11th graders	
12th graders	
High school graduates 17 to 20 years of age	
High school graduates 21 to 25 years of age	
High school graduates over 25 years of age	
Secondary school dropouts 14 to 16 years of age	
Secondary school dropouts 17 to 20 years of age	
Secondary school dropouts 21 to 25 years of age	
Secondary school dropouts over 25 years of age	
Postsecondary dropouts (any age)	
Other(s) (Specify: a.______________________	
b.______________________)	
TOTAL	100 %

33. Estimate the ethnic composition of your program clients. (Percents should total 100.)

	Percent
Native American or American Indian	
Black or Afro-American or Negro	
Spanish-speaking origins	
Mexican American or Chicano	
Puerto Rican	
Other Spanish-speaking origins (specify ______________)	
Oriental or Asian-American	
White or Caucasian	
Other (specify ______________________)	
TOTAL	100 %

34. Give your best estimate of the number of persons who, since 1 July 1973:

	Number
Have had at least one contact with your project	______
Have had at least one contact with your project that led to establishment of a file (however brief) on the contact	______
Have been classified officially as clients and placed in an active file	______
Have dropped out of the active file before service completed	______
Have dropped out without service and then reentered the active file .	______
Have been served, dropped out of the active file, and then reentered active file for additional services	______

35.a. Which of the following types of student related information does your project collect and maintain in project files on nearly all of the project's clients?

	(Circle all that apply)
SAT scores	1
ACT scores	2
Other standardized achievement test scores	3
Other standardized aptitude test scores	4
Attitude scale profiles	5
High school or postsecondary transcripts	6
College or postsecondary applications	7
Recommendations or commendations	8
Parents' Confidential Statement 1040 Form	9
Financial Aid Application	10
Follow-up data on former clients	11
Anecdotal records	12

b. How long is the above information retained in project files after the client is removed from the active files? __________ years.

NOTE: WHEN YOU RETURN THIS QUESTIONNAIRE TO THE RESEARCH TRIANGLE INSTITUTE, PLEASE ENCLOSE WITH IT A COPY OF ANY FORMS USED TO RECORD AND FILE INFORMATION ON YOUR PROJECT'S CLIENTS.

D. Relationships with Local, State, and National Agencies

36.a. Please indicate what other special programs for disadvantaged youth are in the same geographic area as that served by your project; and whether your project works cooperatively with each of the programs.

(Circle one number on each line)

			PROGRAM IS IN AREA AND:	
	Don't know if in area	Program not in area	My project works cooperatively with	My project does not work cooperatively with
Upward Bound programs	1	2	3	4
Other Talent Search programs	1	2	3	4
Neighborhood Youth Corps	1	2	3	4
Cooperative Vocational Education Program (Co-op Program)	1	2	3	4
High School Work-Study Program	1	2	3	4
Work-Dropout Prevention Program	1	2	3	4
High School Equivalency Programs	1	2	3	4
Job Corps	1	2	3	4
Veterans' Programs	1	2	3	4
Special Services	1	2	3	4
Others (specify ______________)	1	2	3	4

b. Does having other programs in your area pose any special problems for your TS project?

(Circle one)

Yes . . . . 1 → (CONTINUE WITH Q. 36.c)

No . . . . 2 → (SKIP TO Q. 36.d)

c. If your answer is yes, list no more than three of the most important ones.

(1) ____

(2) ____

(3) ____

36.d. If there is a UB program in your area, do you recruit for it?

(Circle one)

No	1
Yes, a little	2
Yes, a fair amount	3
Yes, a major portion	4
No UB program in area	5

37. Which of the following functions have parents or community groups performed for this Talent Search project? For each function performed, indicate its effectiveness.

(Circle one number on each line)

	Function not performed	FUNCTION PERFORMED AND ITS DEGREE OF EFFECTIVENESS IS:				
		very low	low	moderate	high	very high
Identification of eligible participants	1	2	3	4	5	6
Identification of potential staff members	1	2	3	4	5	6
Assistance in the development or review of the project application or proposal	1	2	3	4	5	6
Securing additional funds	1	2	3	4	5	6
Mobilizing community resources and support	1	2	3	4	5	6
Serving as a liaison to private and public agencies and institutions	1	2	3	4	5	6
Offering advice and suggestions for program improvements	1	2	3	4	5	6
Other(s) (specify):						
a. ______________________________	1	2	3	4	5	6
b. ______________________________	1	2	3	4	5	6

38. In general, how would you rate the recommendations and suggestions relevant to this project which have been made by the following groups?

(Circle one number on each line)

	No recommendations made	RECOMMENDATIONS MADE AND THEY WERE:			
		poor	fair	good	excellent
Student recommendations	1	2	3	4	5
Staff recommendations	1	2	3	4	5
Parent recommendations	1	2	3	4	5
Community group recommendations	1	2	3	4	5
Regional office recommendations	1	2	3	4	5
National office recommendations	1	2	3	4	5
Recommendations of other groups or individuals (specify: ____________________)	1	2	3	4	5

E. Evaluation

39.a. Does your project regularly (at least annually) conduct an evaluation of its performance?

	(Circle one)
Yes	1 → (CONTINUE WITH Q. 39.b)
No	2 → (SKIP TO Q. 39.c)

b. If your answer is yes, indicate when the most recent evaluation was conducted and briefly describe the evaluation process.

____

____

____ (SKIP TO Q. 40)

____

____

____

c. Have you ever conducted a special evaluation study of your project?

	(Circle one)
Yes	1 → (CONTINUE WITH Q. 39.d)
No	2 → (SKIP TO Q. 40)

d. When did you conduct this study? Month ________ Year ________

NOTE: IF A COPY OF THE STUDY IS AVAILABLE PLEASE ENCLOSE ONE WHEN YOU RETURN THIS QUESTIONNAIRE TO THE RESEARCH TRIANGLE INSTITUTE.

F. Problems and Accomplishments

40. To what extent do you feel that each of the following factors or conditions has been a problem in the operation of your project?

(Circle one number on each line)

	No problem	PROBLEM TO: small extent	moderate extent	great extent
Relations between staff members	1	2	3	4
Relationship between project director and staff	1	2	3	4
Quality of counseling	1	2	3	4
Recruiting students	1	2	3	4
Insufficient personnel in general	1	2	3	4
Inadequate facilities	1	2	3	4
Obtaining support from host institution	1	2	3	4
Obtaining support from parents	1	2	3	4
Obtaining support from community	1	2	3	4
Obtaining cooperation from students	1	2	3	4
Communication with regional office	1	2	3	4
Communication with national office	1	2	3	4
Other(s) (specify: a. ________________	1	2	3	4
b. ________________)	1	2	3	4

41. Listed below are the four areas of project accomplishment or outcomes which are reflected in OE Form 1231. Aside from these four project accomplishments please list below any other accomplishments or outcomes of your project. Also, rank these accomplishments by order of importance, a "1" for the most important, a "2" for the next most important, etc. (If additional space is needed, use reverse side.)

a. Postsecondary placement.
b. Placement in other education and training activities.
c. Dropout prevention and return.
d. Placement in other TRIO programs.

Other Outcomes	Rank
____	______
____	______
____	______
____	______
____	______

G. Technical Assistance Provided by the Office of Education

42. Please indicate whether or not the U. S. Office of Education provides or has provided each of the following services to your project during the current fiscal year. For each service provided, rate the quality of that service with respect to meeting your project's needs. (Space is provided for any additional comments you may wish to make related to those areas of OE service and assistance.)

(Circle one number on each line)

	Service not provided	SERVICE PROVIDED AND IS: very poor	poor	fair	good	very good
A. SERVICE RENDERED PROJECT BY OE REGIONAL OFFICE STAFF:						
Technical assistance in program development	1	2	3	4	5	6
Site visit by regional staff member	1	2	3	4	5	6
Summary of site visits to project	1	2	3	4	5	6
Proposal writing workshops	1	2	3	4	5	6
Information mailings	1	2	3	4	5	6
Conference between regional staff person and project director	1	2	3	4	5	6
Training sessions at project directors' meetings	1	2	3	4	5	6

Comments: ____________________

____

____

____

____

B. SERVICES RENDERED PROJECT BY OE REGIONAL OFFICE STAFF:						
Timely development and promulgation of policy documents	1	2	3	4	5	6
Technical assistance in data collection (in terms of manuals and written instructions for completing data collection forms)	1	2	3	4	5	6
Feedback on data collection (in terms of adequate analysis of data received by project from National Office)	1	2	3	4	5	6

Comments: ____________________

____

____

H. Philosophy

43. What is your philosophy with respect to the Talent Search program?

44.a. What are the objectives of your TS program?

b. How were these objectives determined?

THANK YOU FOR YOUR COOPERATION.

PLEASE RETURN YOUR COMPLETED QUESTIONNAIRE IN THE ADDRESSED AND POSTAGE-PAID ENVELOPE PROVIDED.

IF YOUR ADDRESSED ENVELOPE HAS BEEN MISPLACED, PLEASE SEND YOUR COMPLETED QUESTIONNAIRE TO:

Research Triangle Institute
Post Office Box 12194
Research Triangle Park, North Carolina 27709
Attention: Mr. Milas Kirkpatrick (22U-889-7)

PLEASE REMEMBER ALSO TO MAIL RTI THE FOLLOWING MATERIALS REQUESTED IN THE BODY OF THE QUESTIONNAIRE, IF THEY ARE AVAILABLE:

1. REPORT OF FOLLOW-UP STUDY (SEE Q. 27.f)
2. CLIENT RECORD FORMS (SEE Q. 35)
3. REPORT OF SPECIAL EVALUATION (SEE Q. 39.c)

Appendix H

Talent Search Counselor Questionnaire

RESEARCH TRIANGLE INSTITUTE
POST OFFICE BOX 12194
RESEARCH TRIANGLE PARK, NORTH CAROLINA 27709

CENTER FOR EDUCATIONAL RESEARCH AND EVALUATION

Dear Talent Search Counselor:

Accompanying this letter is a questionnaire designed to gather information about the counseling activities and related issues in your Talent Search project. This questionnaire is part of a nationwide study of the Talent Search program being conducted by the Research Triangle Institute of North Carolina, under contract to the U. S. Office of Education. We hope that you are familiar with this study through our previous communications with your project. Questionnaires are being sent to project directors, counselors, and Advisory Council Chairpersons of all Talent Search projects.

All answers to these questionnaires will be held in strictest confidence. The answers will never be identified with you or your project in any way, and no one from Talent Search or the U. S. Office of Education will ever see them. The code number on each questionnaire serves as identifying information. This code number will be placed on the computer data tapes and will allow the research staff to put together (by computer) the answers to those questionnaires related to the same project. The only key to the code numbers will be kept in locked storage by RTI and will not be accessible to anyone except to the RTI research staff for research requirements only.

Reports of the study will never identify any individual project or person nor will they provide any data that would allow the identity of any individual project or person to be inferred. The reports will describe *groups* of students or *groups* of projects--for example, projects with primarily urban students, or projects whose students are primarily black.

We believe that this initial study of the Talent Search program will document the ways in which Talent Search is helping students, and will suggest ways in which it may better serve them.

When you have completed this questionnaire please return it to the Research Triangle Institute in the accompanying self-addressed and postage-paid envelope.

We thank you very much for participating in this study.

Sincerely,

John Pyecha

John N. Pyecha, Ph.D.
Project Director

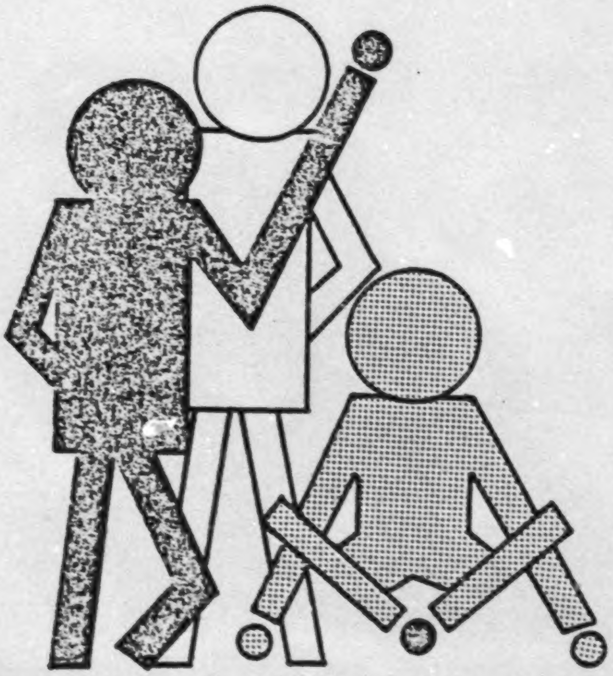
JNP/dd

(919) 549-8311 FROM RALEIGH, DURHAM AND CHAPEL HILL

O.M.B. No. 51-S74016
Approval Expires 12-31-74

TALENT SEARCH

COUNSELOR QUESTIONNAIRE



OE-321-1

TALENT SEARCH COUNSELOR QUESTIONNAIRE

The purpose of this questionnaire is to obtain a description of the counseling activities and related issues of your project. It should be completed by the person most knowledgeable about the project's counseling activities. UNLESS OTHERWISE STATED ANSWER ALL QUESTIONS WITH RESPECT TO THE CURRENT PROJECT YEAR (1 July 1973 to 30 June 1974). All responses will remain confidential in that individual projects or personnel will not be identified.

1. What is the highest earned college degree that is held by each person with full- or part-time counseling responsibilities? Answer this question by indicating the number of persons in each of the following categories. Do not report honorary degrees.

	NUMBER OF	
	Part-time Counselors	Full-time Counselors
No degree	____	____
A degree or diploma based on less than four years' work	____	____
A bachelor's degree	____	____
A master's degree	____	____
A professional or specialist diploma (sixth year) .	____	____
A doctor's degree	____	____

2. How many counselors on the project staff have at least a master's degree in the following areas?

	Number of Counselors
Social Work	____
Clinical Psychology	____
Guidance and/or counseling	____
Other degrees (specify)	
a. ______________________________ .	____
b. ______________________________ .	____
c. ______________________________ .	____
d. ______________________________ .	____

3. As of 1 July 1974, what will be the total number of years of counseling experience held by each member of the full- and part-time counseling staff? Answer this question by indicating the number of persons on the full-time and part-time staff with each of the following years of experience. (Sum the years of part-time and full-time experience for each person.)

	Full-time Staff	Part-time Staff
None		
Less than one year		
1 to 2 years		
3 to 4 years		
5 to 9 years		
10 to 14 years		
15 to 19 years		
20 to 29 years		
30 or more years		

4. How many counselors have worked the following number of years in a Talent Search program? (Write in the total number of counselors in each category.)

	Number of Counselors
Less than a year	
1 to 2 years	
3 to 4 years	
5 years or more	

5. How many counselors have spent the following number of years counseling minority group and/or disadvantaged students prior to working with Talent Search? (Write in the total number of counselors in each category.)

	Number of Counselors
Less than a year	
1 to 2 years	
3 to 4 years	
5 years or more	

6. Has the project provided the counseling staff with inservice training in any of the following areas within the past 12 months?

(Circle one number on each line)

	Yes	No
Dropout prevention	1	2
Diagnosis of student problems	1	2
Use of equipment or materials	1	2
Admission or financial aid requirements	1	2
Veteran's benefits	1	2
Test interpretation	1	2
Individual counseling (personal/social)	1	2
Group counseling	1	2
Crises intervention	1	2
Career education counseling	1	2
Vocational counseling	1	2
Educational counseling	1	2
Counseling minority group members	1	2
Other (specify: ______________________)	1	2

7. Listed below are a number of activities that may (or may not) be performed by the Talent Search counseling staff. In Column A, please estimate the percent of the total counseling staff working time actually spent in each of those areas. In Column B, estimate the percent of time that you think the staff should ideally spend on those functions and activities in order to attain the project's goals. Each column should total 100 percent.

	Column A	Column B
	Percent Time Actually Spent	Percent Time Ideally Spend
Counseling with individual student		
Group counseling sessions with students . . .		
Conferences with parents		
Conferences with teachers of clients		
Assisting local high schools in improving counseling services for disadvantaged students		
Conferences with project staff		
Orientation of students/staff		
Teaching/tutoring		
Supervising peer counselors		
Community and/or agency liaison		
Writing (reports, case studies, etc.)		
Record keeping and clerical work		
Other (specify: ______________________) .		
TOTAL	100 %	100 %

8. Approximately what percent of the staff's counseling time with students is spent dealing with each of the following? Entries should total 100 percent.

	Percent
Career or vocational guidance (NOT for college-bound students), job placement, or referral	______
Four-year college entrance	______
Two-year college entrance	______
Other postsecondary education (not 2- or 4-year college)	______
Personal and family problems	______
Social/situational problems	______
High school attendance	______
High school academic choices	______
High school academic problems	______
Financial concerns	______
Other (specify)	
a. ________________________________ .	______
b. ________________________________ .	______
c. ________________________________ .	______
TOTAL	100 %

9. What are the average lengths of individual and group counseling sessions for your Talent Search students?

(Circle one number in each column)

	Individual	Group
15 minutes or less	1	1
16 to 30 minutes	2	2
31 to 45 minutes	3	3
More than 45 minutes	4	4

10. What is the average number of individual counseling sessions held with students in each of the following age-school categories?

(Circle one number in each column)

	7-8th Graders	9-12th Graders	Out-of-School 14-16 Year Olds	Out-of-School 17-20 Year olds	Out-of-School 21+ Year Olds
Project does not serve this group. .	0	0	0	0	0
One	1	1	1	1	1
Two	2	2	2	2	2
Three	3	3	3	3	3
Four	4	4	4	4	4
Five	5	5	5	5	5
Six	6	6	6	6	6
Seven	7	7	7	7	7
Eight or more .	8	8	8	8	8

11. To what extent does the counseling staff as a whole feel that the following changes or additional services need to be provided by your Talent Search project in order to effectively meet the needs of the clients? Unless otherwise specifically stated, each phrase refers to a change or added service that needs to be provided by the project.

(Circle one number on each line)

		NEEDED TO A:		
	Not Needed	Small Extent	Moderate Extent	Great Extent
Additional counseling	1	2	3	4
Additional remedial programs	1	2	3	4
Additional financial aid	1	2	3	4
Additional educational information	1	2	3	4
Additional vocational information	1	2	3	4
New techniques for assessing educational needs and performance	1	2	3	4
Curricular changes in high school	1	2	3	4
Different academic requirements for high school graduation	1	2	3	4
Work study arrangements	1	2	3	4
Involvement of parents of disadvantaged and minority students	1	2	3	4
Non-traditional instructional techniques	1	2	3	4
Socio-personal counseling	1	2	3	4
Courses in how to study	1	2	3	4
Individual tutoring	1	2	3	4
Courses on heritage of minority groups	1	2	3	4
Special cultural activities	1	2	3	4
Instruction on how to take tests	1	2	3	4
Temporary subsistence	1	2	3	4
New approaches for grading	1	2	3	4
Others (specify)				
a. ______________________________	1	2	3	4
b. ______________________________	1	2	3	4
c. ______________________________	1	2	3	4

12. Listed below are some potential sources of student financial aid for post-secondary education. Do your Talent Search students apply for this aid? (Answer this question by circling a number on each line to the LEFT of the list.) If they do apply, do they obtain the aid? (Answer this question by circling a number on each line to the RIGHT of the list.) DO NOT circle a response on the right if "never" for that same item was circled on the left.

STUDENTS APPLY:				STUDENTS OBTAIN:		
Never	Sometimes	Often		Never	Sometimes	Often
1	2	3	College or university scholarship or loan	1	2	3
1	2	3	State or local scholarship or loan program	1	2	3
1	2	3	Scholarship from a private organization or company	1	2	3
1	2	3	Veterans Administration direct benefits (GI Bill compensation or pension)	1	2	3
1	2	3	ROTC Scholarship Programs	1	2	3
1	2	3	College Work-Study Program	1	2	3
1	2	3	Social Security benefits for students age 18 to 22 (for children of disabled, or deceased parents)	1	2	3
1	2	3	National Defense (Direct) Student Loan Program	1	2	3
1	2	3	Federal Guaranteed Student Loan Program	1	2	3
1	2	3	Basic Educational Opportunity Grant Program	1	2	3
1	2	3	Supplementary Educational Opportunity Grant Program	1	2	3
1	2	3	Health Professions Student Loan Program	1	2	3
1	2	3	Health Professions Scholarship Program	1	2	3
1	2	3	Nursing Student Loan Program	1	2	3
1	2	3	Nursing Scholarship Program	1	2	3
1	2	3	Law Enforcement Education Program	1	2	3
1	2	3	Veterans Administration War Orphans or Survivors Education Benefits Program	1	2	3
1	2	3	Division of Vocational Rehabilitation Program	1	2	3
1	2	3	Bureau of Indian Affairs Grant Program	1	2	3
1	2	3	Tribal Scholarships or Loans	1	2	3
1	2	3	National Scholarship Service and Fund for Negro Students	1	2	3
1	2	3	Other: ______________	1	2	3
1	2	3	Other: ______________	1	2	3

13.a. Please rate the degree of cooperation you have had from high schools and postsecondary institutions in performing your functions as a Talent Search counselor.

(Circle one number on each line)

	Poor	Fair	Good	Excellent	Doesn't apply
High schools	1	2	3	4	5
Proprietary schools	1	2	3	4	5
Public 2-year institutions	1	2	3	4	5
Private 2-year institutions	1	2	3	4	5
Public 4-year universities or colleges	1	2	3	4	5
Private 4-year universities or colleges	1	2	3	4	5

b. If you feel that the degree of cooperation from any of the above is inadequate, please list the major areas in which cooperation should be improved.

14. What sources do you use to assess the strengths, weaknesses, and potential of students in your project?

(Circle one number on each line)

		USED TO A:		
	Not Used	Small Extent	Moderate Extent	Great Extent
High school grades	1	2	3	4
Anecdotal records	1	2	3	4
Teacher evaluations	1	2	3	4
Counselor evaluations	1	2	3	4
Evaluations of knowledgeable others	1	2	3	4
Standardized achievement tests	1	2	3	4
Non-standardized achievement tests	1	2	3	4
Biographical inventories	1	2	3	4
Academic aptitude tests (specify test names)				
a. ______________________________	1	2	3	4
b. ______________________________	1	2	3	4
c. ______________________________	1	2	3	4
Interest inventories	1	2	3	4
Vocational aptitude tests	1	2	3	4
Student self evaluations	1	2	3	4
Others (specify)				
a. ______________________________	1	2	3	4
b. ______________________________	1	2	3	4
c. ______________________________	1	2	3	4

THANK YOU FOR YOUR COOPERATION.

PLEASE RETURN YOUR COMPLETED QUESTIONNAIRE IN THE ADDRESSED AND POSTAGE-PAID ENVELOPE PROVIDED.

IF YOUR ADDRESSED ENVELOPE HAS BEEN MISPLACED, PLEASE SEND YOUR COMPLETED QUESTIONNAIRE TO:

Research Triangle Institute
Post Office Box 12194
Research Triangle Park, North Carolina 27709
Attention: Mr. Milas Kirkpatrick (22U-889-7)

Appendix I

Talent Search Advisory Council Chairperson Questionnaire

RESEARCH TRIANGLE INSTITUTE
POST OFFICE BOX 12194
RESEARCH TRIANGLE PARK, NORTH CAROLINA 27709

CENTER FOR EDUCATIONAL RESEARCH AND EVALUATION

Dear Advisory Council Chairperson:

Accompanying this letter is a questionnaire designed to gather information about the Council and its activities related to the Talent Search program. This questionnaire is part of a nationwide study of the Talent Search program being conducted by the Research Triangle Institute of North Carolina, under contract to the U. S. Office of Education. We hope that you are familiar with this study through our previous communications with your project. Questionnaires are being sent to project directors, counselors, and Advisory Council Chairpersons of all Talent Search projects.

All answers to these questionnaires will be held in strictest confidence. The answers will never be identified with you or your project in any way, and no one from Talent Search or the U. S. Office of Education will ever see them. The code number on each questionnaire serves as identifying information. This code number will be placed on the computer data tapes and will allow the research staff to put together (by computer) the answers to those questionnaires related to the same project. The only key to the code numbers will be kept in locked storage by RTI and will not be accessible to anyone except to the RTI research staff for research requirements only.

Reports of the study will never identify any individual project or person nor will they provide any data that would allow the identity of any individual project or person to be inferred. The reports will describe groups of students or groups of projects--for example, projects with primarily urban students, or projects whose students are primarily black.

We believe that this initial study of the Talent Search program will document the ways in which Talent Search is helping students, and will suggest ways in which it may better serve them.

When you have completed this questionnaire please return it to the Research Triangle Institute in the accompanying self-addressed and postage-paid envelope.

We thank you very much for participating in this study.

Sincerely,

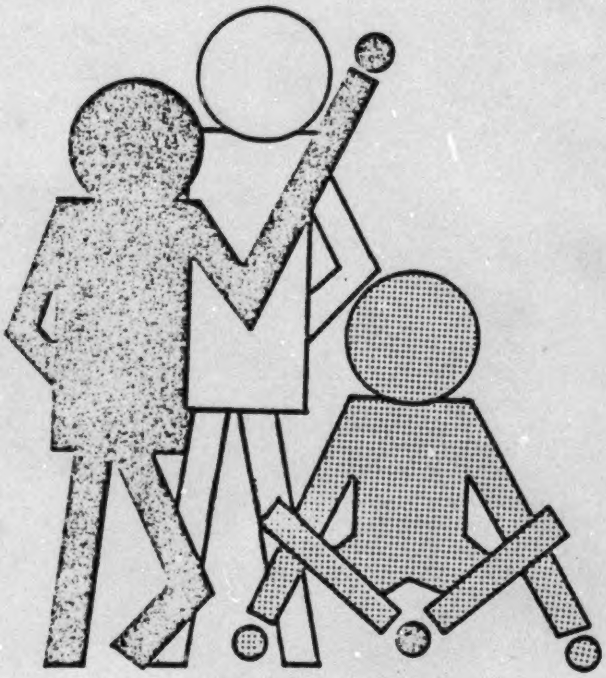
John Pyecha

John N. Pyecha
Project Director

(919) 549-6311 FROM RALEIGH, DURHAM AND CHAPEL HILL

O.M.B. No. 51-S74016
Approval Expires 12-31-74

TALENT SEARCH
ADVISORY COUNCIL CHAIRPERSON
QUESTIONNAIRE



OE-321-2

TALENT SEARCH ADVISORY COUNCIL
CHAIRPERSON QUESTIONNAIRE

The purpose of this questionnaire is to obtain a description of the Council and its activities concerned with the Talent Search program. All responses will remain confidential; no individual project or person will be identified. Please return this completed questionnaire directly to RTI in the self-addressed and postage paid envelope provided by the project director.

1. How many members are on the Advisory Board/Advisory Council? ______________

2. How are the members of the Advisory Board/Advisory Council selected?

(Circle all that apply)

Appointed by the Project Director	1
Appointed by the Board of Directors or some other authority of the sponsoring institution	2
Chosen as individuals to represent other organizations	3
Chosen by virtue of positions held in other organizations	4
Chosen from among volunteers	5
Other(s) (specify a. ______________________________ . .	6
b. ______________________________) .	7

3. Are there regularly scheduled meetings of the Board/Council?

(Circle one)

Yes	1 → (CONTINUE WITH Q. 4)
No	2 → (SKIP TO Q. 5)

4. How often is the Advisory Board/Advisory Council regularly scheduled to meet?

(Circle one)

Monthly	1
Quarterly	2
Five times per year	3
Other (specify ______________________________) .	4

5. Approximately how often does the Advisory Board/Advisory Council have unscheduled meetings? ____________ per year.

6. (1) Please check (✓) in Column A those responsibilities which were mandated to the Board/Council. (2) For every activity (mandated or unmandated), please rate in Column B the degree of influence which you feel the Board/Council has had on the activity. (3) Please rate in Column C the level of influence you feel the Board/Council should have on each activity.

Column A		Column B				Column C			
		PRESENT INFLUENCE				DESIRED LEVEL OF INFLUENCE			
Check Here If Mandated		None	Very Little	Some	Very Much	None	Very Little	Some	Very Much
____	Designing program goals	1	2	3	4	1	2	3	4
____	Developing project proposal	1	2	3	4	1	2	3	4
____	Selecting project director	1	2	3	4	1	2	3	4
____	Hiring project staff	1	2	3	4	1	2	3	4
____	Raising additional funds	1	2	3	4	1	2	3	4
____	Recruiting volunteer services	1	2	3	4	1	2	3	4
____	Promoting target community involvement	1	2	3	4	1	2	3	4
____	Coordinating activities with other institutions and organizations (e.g., UB, SSDS, Job Corps, etc.)	1	2	3	4	1	2	3	4
____	Sensitizing educational institutions as to the needs of disadvantaged students	1	2	3	4	1	2	3	4
____	Evaluating project staff	1	2	3	4	1	2	3	4
____	Evaluating overall project performance	1	2	3	4	1	2	3	4
____	Approving program modifications	1	2	3	4	1	2	3	4

7. Which of the following best describes the relationship between the Project Director and the Advisory Board/Advisory Council?

(Circle one)

Project Director is accountable to the Board/Council	1
Board/Council is accountable to the Project Director	2
Board/Council serves in an advisory role to the Project Director .	3

8. What in your opinion are the major achievements of the Talent Search project your council advises? (List no more than three; if no major achievements, write in "none.")

9. What could be done to increase the council's effectiveness in serving Talent Search? (List no more than three suggestions. If the council's effectiveness cannot be improved, write in "N.A.")

(Your Name)

(Street) (City) (State) (Zip)

(Telephone Number)

PLEASE TURN TO THE NEXT PAGE

THANK YOU FOR YOUR COOPERATION.

PLEASE RETURN YOUR COMPLETED QUESTIONNAIRE IN THE ADDRESSED AND POSTAGE-PAID ENVELOPE PROVIDED.

IF YOUR ADDRESSED ENVELOPE HAS BEEN MISPLACED, PLEASE SEND YOUR COMPLETED QUESTIONNAIRE TO:

Research Triangle Institute
Post Office Box 12194
Research Triangle Park, North Carolina 27709
Attention: Mr. Milas Kirkpatrick (22U-889-7)

Appendix J

Educational Talent Search Client Record Form

EDUCATIONAL TALENT SEARCH CLIENT RECORD FORM

Response Item	Code		Card Number	Column Number
	Information Obtained			
	From File	Outside File		
Region Number		— —	1	1-2
Project ID		— —	1	3-4
Client Type				
Current	6	6	1	5
Past	7	7		
Serial Number		— — —	1	6-8
Client Type Source	1	2	1	9
Status of client's file at time of site visit				
Active	1	6	1	10
Inactive	2	7		
Other	3	8		
Client's age at time of initial TS contact (3 digit entry)	— — 0	— — 1	1	11-13
Client's sex				
Male	1	6	1	14
Female	2	7		
Ethnicity				
Black or Afro-American	10	11	1	15-16
Mexican-American or Chicano	20	21		
Native American or Indian	30	31		
Oriental or Asian-American	40	41		
Puerto Rican	50	51		
White or Caucasian	60	61		
Other Spanish-speaking origins	70	71		
None of the above	80	81		
Client's marital status at time of initial Talent Search contact.				
Single	1	6	1	17
Married	2	7		
Divorced	3	8		
Separated	4	9		
Is client a veteran?				
Yes	1	6	1	18
No	2	7		
Client's work status at time of initial Talent Search contact.				
Unemployed	1	6	1	19
Employed full-time	2	7		
Employed part-time	3	8		
Other	4	9		

Response Item	Code Information Obtained		Card Number	Column Number
	From File	Outside File		
Client's type of work at time of intake if employed			1	20-21
LABORER OR SERVICE WORKER; such as factory or farm worker, bus driver, taxi driver, truck driver, mine worker, construction worker, waiter or waitress, gas station attendant, gardner, cook, maid, custodian, guard, fireman, policeman, seamstress, beautician or barber, practical nurse	10	11		
CRAFTSMAN OR FOREMAN; such as carpenter, mechanic, plumber, electrician, baker, mason, tile setter, painter, television repairman, machinist	20	21		
OFFICE OR SALES; such as store clerk, bank teller, bookkeeper, mailman, mail clerk, office worker, secretary, telephone operator, real estate or insurance agent	30	31		
MANAGER OR OWNER; such as farm owner, business owner, store or office manager, banker, government official, administrator	40	41		
PROFESSIONAL OR TECHNICAL; such as teacher, doctor, engineer, lawyer, social worker, accountant, musician, dentist, registered nurse, librarian, artist, actor, writer, engineering technician, science technician, and health technician	50	51		
HOMEMAKER OR HOUSEWIFE full-time	60	61		
Client's approximate income before taxes in 1973			1	2
$0	10	11		
Less than $3,000 a year (about $60 a week or less)	20	21		
Between $3,000 and $5,999 a year (from $60 to $119 a week)	30	31		
Between $6,000 and $7,499 a year (from $120 to $149 a week)	40	41		
Between $7,500 and $8,999 a year (from $150 to $179 a week)	50	51		
Between $9,000 and $10,499 a year (from $180 to $209 a week)	60	61		
Between $10,500 and $11,999 a year (from $210 to $239 a week)	70	71		
Between $12,000 and $13,499 a year (from $240 to $269 a week)	80	81		
Over $13,500 a year (about $270 a week or more	90	91		
Income from source other than employment (DPA, Welfare, benefits, etc.)			1	24
Yes	1	3		
No	2	4		

Response Item	Code		Card Number	Column Number
	Information Obtained			
	From File	Outside File		
Approximate family income before taxes of client's parents or guardians in 1973			1	25-26
$0	10	11		
Less than $3,000 a year (about $60 a week or less)	20	21		
Between $3,000 and $5,999 a year (from $60 to $119 a week)	30	31		
Between $6,000 and $7,499 a year (from $120 to $149 a week)	40	41		
Between $7,500 and $8,999 a year (from $150 to $179 a week)	50	51		
Between $9,000 and $10,499 a year (from $180 to $209 a week)	60	61		
Between $10,500 and $11,999 a year (from $210 to $239 a week)	70	71		
Between $12,000 and $13,499 a year (from $240 to $269 a week)	80	81		
Over $13,500 a year (about $270 a week or more	90	91		
Grade level enrolled in at time of initial Talent Search contact			1	27-29
Not enrolled	010	011		
7th	020	021		
8th	030	031		
9th	040	041		
10th	050	051		
11th	060	061		
12th	070	071		
GED Program	080	081		
Adult Basic Education	090	091		
Postsecondary	100	101		
Highest grade level completed at time of initial TS contact.			1	30-31
7th	10	11		
8th	20	21		
9th	30	31		
10th	40	41		
11th	50	51		
12th	60	61		
1 year postsecondary education	70	71		
2 or more years postsecondary education . .	80	81		
GED or similar program	90	91		
Was student a graduate from high school at initial contact? Yes	1	6	1	32
No	2	7		

NOTE: ANY REFERENCE TO TEST SCORES ON THIS PAGE MEANS MOST RECENT SCORES.

Response Item	Code		Card Number	Column Number
	Information Obtained			
	From File	Outside File		
Year graduated, if graduated (last two digits of year)	__ __ 0	__ __ 1	1	33-35
Transcripts in file?	1	2	1	36
Letters of recommendation in file?	1	2	1	37
PSAT scores in file?	1	2	1	38
PSAT Verbal Score (2 digits)	__ __		1	39-40
PSAT Math Score (2 digits)	__ __		1	41-42
PSAT Total Score (3 digits)	__ __ __		1	43-45
SAT scores in file?	1	2	1	46
SAT Verbal Score (3 digits)	__ __ __		1	47-49
SAT Math Score (3 digits)	__ __ __		1	50-52
SAT Total Score (4 digits)	__ __ __ __		1	53-56
ACT Scores in file?	1	2	1	57
ACT Standard English Score (2 digits)	__ __		1	58-59
ACT Standard Math Score (2 digits)	__ __		1	60-61
ACT Standard Social Studies Scores (2 digits)	__ __		1	62-63
ACT Standard Natural Sciences Score (2 digits)	__ __		1	64-65
ACT Standard Composite Score (2 digits)	__ __		1	66-67
Other achievement scores in file?	1	2	1	68
Aptitude scores in file?	1	2	1	69
Financial aid application in file?	1	2	1	70
Parent's Confidential Statement in file?	1	2	1	71
Autobiography in file?	1	2	1	72
Letter(s) of recommendation in file?	1	2	1	73
Follow-up data in file?	1	2	1	74
Anecdotal records in file?	1	2	1	75
Did client live in model cities area at time of initial TS contact?				
Yes	1	6	1	76
No	2	7		

Response Item	Code		Card Number	Column Number
	Information Obtained			
	From File	Outside File		
Did client live in urban renewal area at time of *initial* TS contact?			1	77
Yes	1	6		
No	2	7		
Leave Blank (extra spaces)	BLANK		1	78-79
Card Number		1	1	80
Eight digit ID code (from card 1, Cols. 1-8) .	_ _ _ _ _ _ _ _		2	1-8
Did client live in a federal housing project at time of *initial* TS contact?			2	9
Yes	1	6		
No	2	7		
Did client live in an Indian reservation at time of *initial* TS contact?			2	10
Yes	1	6		
No	2	7		
Did client live on a farm at time of *initial* TS contact?			2	11
Yes	1	6		
No	2	7		
Was low income and related criteria used to determine eligibility for client?			2	12
Yes	1	6		
No	2	7		
Was cultural or geographic isolation used to determine eligibility for client?			2	13
Yes	1	6		
No	2	7		
Was "Exceptional Potential" used to determine eligibility for client?			2	14
Yes	1	6		
No	2	7		
Was some "other" criterion used to determine eligibility for client?			2	15
Yes	1	6		
No	2	7		
Had client taken part in UB prior to intake?			2	16
Yes	1	6		
No	2	7		

Response Item	Code		Card Number	Column Number
	Information Obtained			
	From File	Outside File		
Has client taken part in College Readiness prior to intake? Yes No	1 2	6 7	2	17
Has client taken part in College Bound prior to intake? Yes No	1 2	6 7	2	18
Has client taken part in Aspira prior to intake? Yes No	1 2	6 7	2	19
Has client taken part in Project Opportunity prior to intake? Yes No	1 2	6 7	2	20
Has client taken part in Educational Opportunity prior to intake? Yes No	1 2	6 7	2	21
Has client taken part in Project Access prior to intake? Yes No	1 2	6 7	2	22
Has client taken part in A Better Chance prior to intake? Yes No	1 2	6 7	2	23
Has client taken part in Cooperative Vocational Education Program ("Co-Op" Program) prior to intake? Yes No	1 2	6 7	2	24
Has client taken part in High School Vocational Education Work-Study Program prior to intake? Yes No	1 2	6 7	2	25
Has client taken part in Neighborhood Youth Corps ("NYC") prior to intake? Yes No	1 2	6 7	2	26
Has client taken part in one other special program prior to intake? Yes (specify ____________________) No	1 2	6 7	2	27
Has client taken part in a second other special program prior to intake? Yes (specify ____________________) No	1 2	6 7	2	28

Response Item	Code: Information Obtained From File	Code: Information Obtained Outside File	Card Number	Column Number
Was client dropped from active file with no change from pre-Talent Search educational status?				
Yes	1	6	2	29
No	2	7		
Is the client in the active file with no change from pre-Talent Search educational status?				
Yes	1	6	2	30
No	2	7		
If dropout, did client enroll in secondary education after entry in the Talent Search program?				
Yes	1	6	2	31
No	2	7		
Did client enter G.E.D. or high school equivalency program after entry in the Talent Search program?				
Yes	1	6	2	32
No	2	7		
Did client complete G.E.D. program or high school equivalency program after entry in the Talent Search program?				
Yes	1	6	2	33
No	2	7		
Did client enroll in and/or complete Adult Basic Education Program after entry in the Talent Search program?				
Yes	1	6	2	34
No	2	7		
Did client dropout of a secondary or post-secondary program during or after being in the Talent Search program?				
Yes	1	6	2	35
No	2	7		
Did client enter Armed Forces after entry in the Talent Search program?				
Yes	1	6	2	36
No	2	7		

Response Item	Code		Card Number	Column Number
	Information Obtained			
	From File	Outside File		
Did client enter ACTION (Job Corps, Peace Corps, VISTA), Manpower, or other on-the-job training program after entry in the Talent Search program?				
Yes	1	6		
No	2	7	2	37
Did client apply and gain acceptance for entry in any postsecondary institution between time of entry in the Talent Search program and March 1974?				
Yes	1	6		
No	2	7	2	38
Did client apply but not gain acceptance for entry in any postsecondary institution between time of entry in the Talent Search program and March 31, 1974?				
Yes	1	6		
No	2	7	2	39
Did client begin studies in a postsecondary institution after entry in the Talent Search program?				
Yes	1	6		
No	2	7	2	40
Did client enter an Upward Bound program after entry in the Talent Search program?				
Yes	1	6		
No	2	7	2	41
Did client enter a Special Services program after being in the Talent Search program?				
Yes	1	6		
No	2	7	2	42
Did client apply for financial aid after being in the Talent Search program?				
Yes	1	6		
No	2	7	2	43
Did client change status in some "other" way after entry in the Talent Search program?				
Yes (specify ____________________)	1	6		
No	2	7	2	44
Did client change status in some second "other" way after entry in the Talent Search program?				
Yes (specify ____________________)	1	6		
No	2	7	2	45

	Code			
	Information Obtained			
Response Item	From File	Outside File	Card Number	Column Number
Date of initial Talent Search contact.				
Day	__ __	__ __	2	46-47
Month	__ __	__ __	2	48-49
Year	__ __ 0	__ __ 1	2	50-52
Date of last Talent Search contact.				
Day	__ __	__ __	2	53-54
Month	__ __	__ __	2	55-56
Year	__ __ 0	__ __ 1	2	57-59
Total number of client contacts (include initial and last contacts)	__ __ 0	__ __ 1	2	60-62
Blank (extra spaces)	BLANK		2	63-79
Card number		2	2	80

For those students enrolled in a postsecondary education program (after leaving ETS), indicate the amount of financial aid received from the following sources:

SCHOLARSHIPS OR GRANTS

Basic Education Opportunity Grant Program . . . . $__________

Supplementary Educational Opportunity Grant Program . . . . . $__________

College scholarship or grant from college funds . . . . $__________

ROTC scholarship or stipend . . . . $__________

Nursing Scholarship Program . . . . $__________

Health Profession Scholarship Program . . . . $__________

State scholarships . . . . $__________

Other scholarships . . . . $__________

LOANS

Federal Guaranteed Student Loan Programs . . . . $__________

State Loan Program . . . . $__________

Regular bank loan . . . . $__________

National Defense (Direct) Student Loan Program . . . . $__________

Health Professions Student Loan Program . . . . $__________

Nursing Student Loan Program . . . . $__________

OTHER

Law Enforcement Educational Program . . . . $__________

Veterans Administration War Orphans or Survivors Benefits Program . . . . $__________

Veterans Administration direct benefits (GI Bill compensation or pension) . . . . $__________

Vocational Rehabilitation Program benefits . . . . $__________

Social Security Benefits (for students aged 18-22 who are children of retired, disabled, or deceased parents) . . . . $__________

GRADES AND ANY ADDITIONAL INFORMATION

Appendix K

Participant Eligibility[1/]

and

Program Legislation[2/] For TRIO Programs

[1/] Application Information and Program Manual: Talent Search, Upward Bound, Special Services. (An Office of Education Program Administration Manual, 1973-74). Washington, D.C.: U.S. Department of Health, Education and Welfare, September 1973, Appendix A.

[2/] Ibid, pp. 2-3.

October 1973

Appendix K

Participant Eligibility

The Talent Search, Upward Bound, and Special Services for Disadvantaged Students Programs have been established by the Congress as "Special Programs for Students from Disadvantaged Backgrounds."

"Disadvantaged" is defined in the law as students from low-income families who are in need of the services provided by the separate program activities to enter, continue, or resume a program of post-secondary education. Talent Search programs, by law, may serve students who live in cultural isolation without regard to income.

Three factors govern participant eligibility for TRIO Programs:

1. Financial eligibility.
2. Need for such students for the program services.
3. Citizenship.

I. INCOME CRITERIA (Effective September 1, 1973).

A. Eighty percent of the students served by a Talent Search, Upward Bound, and/or Special Services for Disadvantaged Students Program must meet the following low-income criteria (Low-income criteria is based on the adjusted gross family income):

Number of Family Members	Non-Farm	Farm
1	$ 2,254	$ 1,916
2	2,823	2,399
3	3,356	2,838
4	4,277	3,644
5	5,048	4,301
6	5,679	4,849
7	7,000	5,963
	**Add $600 for each additional member.	**Add $500 for each additional member.

B. Discretion is granted to the Project Director to admit up to twenty percent (20%) of the students in a project whose adjusted gross family income before taxes is as follows:

Number of Family Members	Non-Farm	Farm
1	$ 2,800	$ 2,400
2	3,500	3,000
3	4,200	3,500
4	5,300	4,600
5	6,300	5,400
6	7,100	6,100
7	8,800	7,500
	***Add $800 for each additional member.	***Add $700 for each additional member.

C. A participant is considered eligible under List B if he meets either of the following criteria:

1. The student lives in federally supported low-income housing;
2. The student is from a family on a state or federally funded welfare program.

D. The Project Director may admit to his program under the percentage governing List B a student who is part of a family where there is serious mismanagement of income so that little, if any, of such income accrues to the benefit of the student. In such cases, the Project Director must obtain written testimony from a reliable third party that serious mismanagement of a family's income does exist and works a significant hardship on the prospective participant.

E. Physically Handicapped Students are eligible to participate in Special Services for Disadvantaged Students Programs on the basis of need only.

II. NEED

The Need Criteria is discussed under the provisions of the individual TRIO Programs in the Program Manual.

III. CITIZENSHIP

Citizenship is defined as an individual who is a national of the United States (a citizen or other person who owes permanent allegiance to the United States), or an individual who is in the United States for other than a temporary purpose and intends to become a permanent resident thereof, or is a permanent resident of the Trust Territories of the Pacific Islands.

LEGISLATION

Special Programs for Students From Disadvantaged Backgrounds

"PROGRAM AUTHORIZATION

"Sec. 417A. (a) The Commissioner shall, in accordance with the provisions of this subpart, carry out a program designed to identify qualified students from low-income families, to prepare them for a program of postsecondary education, and to provide special services for such students who are pursuing programs of postsecondary education.

"(b) For the purpose of enabling the Commissioner to carry out this subpart, there are authorized to be appropriated $100,000,000 for the fiscal year ending June 30, 1973, and for each of the succeeding fiscal years ending prior to July 1, 1975.

"AUTHORIZED ACTIVITIES

Sec. 417B. (a) The Commissioner is authorized (without regard to section 3709 of the Revised Statutes (41 U.S.C. 5)) to make grants to, and contracts with, institutions of higher education, including institutions with vocational and career education programs, combinations of such institutions, public and private agencies and organizations (including professional and scholarly associations), and, in exceptional cases, secondary schools and secondary vocational schools, for planning, developing, or carrying out within the States one or more of the services described in section 417A(a).

"(b) Services provided through grants and contracts under this subpart shall be specifically designed to assist in enabling youths from low-income families who have academic potential, but who may lack adequate secondary school preparation or who may be physically handicapped, to enter, continue, or resume a program of postsecondary education, including--

"(1) programs, to be known as 'Talent Search', designed to--

"(A) identify qualified youths of financial or cultural need with an exceptional potential for postsecondary educational training and encourage them to complete secondary school and undertake postsecondary educational training,

"(B) publicize existing forms of student financial aid, including aid furnished under this title, and

"(C) encourage secondary-school or college dropouts of demonstrated aptitude to reenter educational programs, including post-secondary-school programs;

"(2) programs, to be known as 'Upward Bound', (A) which are designed to generate skills and motivation necessary for success in education beyond high school and (B) in which enrollees from low-income backgrounds and with inadequate secondary-school preparation participate on a substantially full-time basis during all or part of the program;

"(3) programs, to be known as 'Special Services for Disadvantaged Students', of remedial and other special services for students with academic potential (A) who are enrolled or accepted for enrollment at the institute which is the beneficiary of the grant or contract, and (B) who, by reason of deprived educational, cultural, or economic background, or physical handicap, are in need of such services to assist them to initiate, continue, or resume their postsecondary education; and

"(4) a program of paying up to 75 per centum of the cost of establishing and operating Educational Opportunity Centers which--

"(A) serve areas with major concentrations of low-income populations by providing, in coordination with other applicable programs and services--

"(i) information with respect to financial and academic assistance available for persons in such areas desiring to pursue a program of postsecondary education;

"(ii) assistance to such persons in applying for admission to institutions, at which a program of postsecondary education is offered, including preparing necessary applications for use by admission and financial aid officers; and

"(iii) counseling services and tutorial and other necessary assistance to such persons while attending such institutions; and

"(B) serve as recruiting and counseling pools to coordinate resources and staff efforts of institutions of higher education and of other institutions offering programs of postsecondary education, in admitting educationally disadvantaged persons.

The portion of the cost of any project assisted under clause (4) in the preceding sentence which is borne by the applicant shall represent an increase in expenditure by such applicant for the purposes of such project.

"c) Enrollees who are participating on an essentially full-time basis in one or more services being provided under this section may be paid stipends, but not in excess of $30 per month except in exceptional cases as determined by the Commissioner.".

(2) The amendment made by paragraph (1) shall be effective after June 30, 1972.

Appendix L

Form Sent to Project Directors for Listing Clients who Began Studies at a Postsecondary Institution Between July 1 and December 31, 1973

RESEARCH TRIANGLE INSTITUTE
POST OFFICE BOX 12194
RESEARCH TRIANGLE PARK, NORTH CAROLINA 27709

CENTER FOR EDUCATIONAL RESEARCH AND EVALUATION

The Research Triangle Institute (RTI) is conducting a study of the Upward Bound and Educational Talent Search Programs. Memoranda concerning this study have been sent to you through your regional office. On the chance that you may not yet have received them, we are enclosing a brief abstract of the proposed research (Attachment A). An Advisory Committee is counseling the RTI research team in its design efforts, and the names and addresses of the members of this committee are also enclosed (Attachment B).

As part of the larger study, a sub-study of current Talent Search projects is being conducted. The Talent Search sub-study in turn has three basic components, the first of which involves a questionnaire survey of all 114 Talent Search projects.

The second component is a brief status study of a sample of Talent Search students who began studies in postsecondary institutions between July 1 and December 31, 1973. This sample of students will be selected from a sample of 25 Talent Search projects. Your project is one of those selected to participate in this important component of the Talent Search sub-study.

The third component involves two-day site visits to a random sample of approximately 20 projects. A final selection of the projects to be visited has not yet been made. We hope, however, to select the 20 projects for these site visits from among the 25 projects selected to participate in the second component above. Consequently, your project has a high probability of also being selected for a site visitation.

So that you will have a better understanding of the Talent Search sub-study, a brief overview of this sub-study is presented in Attachment C.

This letter requests your assistance and cooperation with respect to the second component of the Talent Search sub-study; that is, the status study of Talent Search students who began studies in post-secondary institutions during the first half of the current fiscal year.

(919) 549-8311 FROM RALEIGH, DURHAM AND CHAPEL HILL

In order to provide an adequate sampling design for this part of the study, RTI needs certain information about these students (i.e., those students who began studies in institutions of postsecondary education between July 1 and December 31, 1973). While these data are routinely available through the data bank for UB participants, no central list is available for TS clients. (OE Form 1231 provides only numbers, not names.)

Your cooperation is requested in preparing a list of all clients from your project who began their postsecondary studies within this time frame (July 1 to December 31, 1973). Enclosed for this purpose is a form which is basically self explanatory. The first or "Header Page" has space for ten students (though you may need to use more than one line per student); each "Continued Page" has space for 15. One "Header Page" and five "Continued Pages" are enclosed. If additional forms are required for your project, please xerox as many addiitonal copies of the Continued Page as needed. Please complete this form as soon as possible and return it to RTI in the enclosed postage-paid envelope.

We wish to thank you and your staff for assisting and cooperating in this study. Your contributions will help document the many ways in which Talent Search is helping students and will also suggest ways in which the program can better serve them.

If you have questions about the enclosed form for TS students, please contact Dr. John N. Pyecha of RTI, whose telephone number is (919) 549-8311, extension 705. If you have any questions concerning the study in general, Dr. Pyecha or any member of the Advisory Committee will be glad to discuss them with you.

Sincerely,

John N. Pyecha, Ph.D.
Project Director

JNP/dd

Enclosures

HEADER PAGE

Talent Search Clients Who Began Studies at A Postsecondary Educational Institution Between July 1 and December 31, 1973

Project Descriptors:

(Project Director) (Name of Project) (Street Address) (City) (State) (Zip) (Date) ( ) (Telephone)

Name (last name first)	Home Address (Street) (City) (State)	Birthdate			Race[1]	Sex (M or F)	Postsecondary Educational Institution[2]				
							Name	Address	Date Student Began Studies		Type of Participation[3]
		Mo.	Day	Yr.					Mo.	Yr.	

---

[1] B = Black; W = White; I = Indian; C = Chicano; P = Puerto Rican; O = Other.

[2] List the institution in which the student is currently enrolled if he has attended more than one institution between July 1 and December 31, 1973. Do not include those students who you know are no longer enrolled in a postsecondary institution.

[3] P = Part-time Student; F = Full-time Student; DK = Don't Know.

CONTINUED PAGE

Talent Search Clients Who Began Studies at a Postsecondary Educational Institution Between July 1 and December 31, 1973

Name (last name first)	Home Address (Street) (City) (State)	Birthdate			Race	Sex (M or F)	Postsecondary Educational Institution[2]				
									Date Student Began Studies		Type of Partici-pation[3]
		Mo.	Day	Yr.			Name	Address	Mo.	Yr.	

Appendix M

Form Sent to Registrars of Postsecondary Institutions to Verify Enrollment Status of Former ETS Clients

RESEARCH TRIANGLE INSTITUTE
POST OFFICE BOX 12194
RESEARCH TRIANGLE PARK, NORTH CAROLINA 27709

CENTER FOR EDUCATIONAL RESEARCH AND EVALUATION

Dear Registrar:

Research Triangle Institute, a not-for-profit private research organization in North Carolina has a contract with the U. S. Office of Education to conduct a nationwide study of two programs for low-income and minority high school students, Upward Bound and Educational Talent Search. This study includes a sample of former Talent Search clients who have been reported as enrolling in postsecondary educational institutions since July 1, 1973.

The purpose of this letter is to inform you that some of the students selected in this nationwide study have been reported as enrolling in your institution. We would greatly appreciate your providing up to four items of information on each of the students listed on the enclosed computer printout. First indicate if the student has actually enrolled at your institution; if he has not, no further information is required on that student. If the student did enroll, please provide his most current grade point average (if such information is available and can be released by your institution). Further, if the student did enroll, please indicate whether or not he is still enrolled. For those students still enrolled, no further information is required. If, however, the student is no longer enrolled, please indicate the student's reason for leaving--i.e., transferred, dropped, or dismissed. For our purposes, determination as to whether a student dropped out or transferred can be made on the basis of request for transcript sent to another postsecondary institution. If such request was made, please indicate that student has transferred.

We realize that your office is confronted with many time consuming demands, but we hope that you can spare the time to assist us in this most worthwhile study. With the minimization of involvement of your office in mind, we have kept the information requested to the minimum necessary to answer the questions required by the U. S. Office of Education.

To give you some idea of the scope of the current study, we have enclosed with this letter a brief abstract of the evaluation study and a list of the Advisory Committee members who helped plan the study. I hope you will have time to review this information. Should you have any questions regarding this study please call Mr. Don King or myself at (919) 549-8311 or any of the Advisory Committee members listed.

Thank you for your time and cooperation.

Sincerely,

John Pyecha

John N. Pyecha, Ph.D.
Project Director

JNP:ls
Enclosures

(919) 549-8311 FROM RALEIGH, DURHAM AND CHAPEL HILL

Educational Talent Search Client Postsecondary Status Report Form

Below are listed the names and home addresses of students who were reported to have enrolled in your institution during the period of 1 July to 31 December 1973. Please indicate by checking the appropriate response in Column A if the student did, in fact, enroll at your institution. For those students who did enroll, please indicate by checking the appropriate response in Column B whether the student is still enrolled at your institution. For those students who are no longer enrolled, please indicate whether the student dropped (or was dropped) from school or whether the student transferred to another institution by checking the appropriate response in Column C. For all students who actually enrolled (regardless of subsequent disposition) please indicate their most current grade point average at your institution in Column D.

	A		B		C			D
	Did Student Enroll?		Is Student Still Enrolled?		Reason for Student Leaving (Regardless of Response, Go To Column D)			Most Recent Grade Point Average
Name and Home Address	No	Yes (If Yes Go To Column B)	No (If No Go To Column C)	Yes (If Yes Go To Column D)	Student Dropped	Student Was Dropped	Student Transferred	

Educational Talent Search Client Postsecondary Status Report Form
(continued)

	A		B		C			D
	Did Student Enroll?		Is Student Still Enrolled?		Reason for Student Leaving (Regardless of Response, Go To Column D)			Most Recent Grade Point Average
Name and Home Address	No	Yes (If Yes Go To Column B)	No (If No Go To Column C)	Yes (If Yes Go To Column D)	Student Dropped	Student Was Dropped	Student Trans- ferred	

Appendix N

OE Form 1227

DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE
OFFICE OF EDUCATION
WASHINGTON, D.C. 20202

FORM APPROVED.
OMB NO. 51-R0866

QUARTERLY FINANCIAL REPORT
FOR SPECIAL PROGRAMS

(TALENT SEARCH, SPECIAL SERVICES FOR DISADVANTAGED STUDENTS OR UPWARD BOUND PROGRAM GRANTEES)

(READ INSTRUCTIONS CAREFULLY BEFORE COMPLETING)

A. NAME AND ADDRESS OF GRANTEE	B. AREA CODE	TELEPHONE NUMBER	EXT.
	C. GRANT NUMBER		

D. NAME OF PROGRAM (CHECK ONLY ONE)

☐ TALENT SEARCH

☐ SPECIAL SERVICES FOR DISADVANTAGED STUDENTS

☐ UPWARD BOUND

	FROM			TO		
	MONTH	DAY	YEAR	MONTH	DAY	YEA
E. GRANT PERIOD						
F. REPORT PERIOD						
G. TOTAL GRANT FUNDS RECEIVED FROM BEGINNING OF GRANT PERIOD TO END OF THE REPORT PERIOD				$		

	H. FEDERAL FUNDS APPROVED AND EXPENDED COST CATEGORY	TOTAL FUNDS APPROVED (COLUMN 1)	EXPENDITURES THIS REPORT PERIOD (COLUMN 2)	CUMULATIVE EXPENDITURES (COLUMN 3)	UNEXPENDED BALANCE (COLUMN 1 MINUS COLUMN 3) (COLUMN 4)
1	TOTAL PERSONNEL COSTS (SALARIES, WAGES, AND BENEFITS)	$	$	$	$
2	TRAVEL				
3	EQUIPMENT				
4	ROOM AND BOARD (UPWARD BOUND ONLY)				
5	STIPENDS (UPWARD BOUND ONLY)				
6	TUITION (UPWARD BOUND ONLY)				
7	SERVICES (INCLUDING CONSULTANTS)				
8	OTHER (SEE INSTRUCTIONS)				
9	TOTAL DIRECT COSTS				
10	INDIRECT COSTS				
11	TOTAL PROJECT COST				

I. BUDGET CHANGES: IF THERE HAVE BEEN ANY BUDGET OR WORK PROGRAM CHANGES, EXPLAIN ON SEPARATE SHEET AND ATTACH TO FORM.

CERTIFICATION BY GRANTEE: I HEREBY CERTIFY THAT THIS REPORT IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, AND THAT ALL EXPENDITURES REPORTED HEREIN HAVE BEEN MADE IN ACCORDANCE WITH APPROPRIATE GRANT POLICIES AND FOR THE PURPOSES SET FORTH IN THE APPLICATION AND AWARD DOCUMENTS.

J-1 FISCAL OFFICER (SIGNATURE)	J-2 TYPED NAME AND TITLE	J-3 DATE
K-1 PROJECT DIRECTOR (SIGNATURE)	K-2 TYPED NAME OF PROJECT DIRECTOR	K-3 DATE

OE FORM 1227, 6/74

ITEMIZATION OF COSTS IN LINE 8, PAGE 1	TOTAL FUNDS APPROVED (COLUMN 1)	EXPENDITURES THIS REPORT PERIOD (COLUMN 2)	CUMULATIVE EXPENDITURES (COLUMN 3)	UNEXPENDED BALANCE (COLUMN 1 MINUS COLUMN 3) (COLUMN 4)
	$	$	$	$

INSTRUCTIONS

REPORT REQUIREMENTS AND MAILING ADDRESS - A SEPARATE QUARTERLY FINANCIAL REPORT IS REQUIRED FOR EACH PROGRAM BY THE U.S. OFFICE OF EDUCATION FOR EACH QUARTER OF THE GRANT PERIOD. A SIGNED ORIGINAL AND ONE COPY OF THE FORM MUST BE RECEIVED NO LATER THAN 15 DAYS AFTER THE END OF THE FIRST, SECOND, AND THIRD REPORT PERIODS AND 60 DAYS AFTER THE END OF THE FINAL REPORT PERIOD. THE FORMS ARE TO BE MAILED TO THE GRANTS AND PROCUREMENT OFFICER IN THE GRANTEE'S RESPECTIVE HEW/OE REGIONAL OFFICE OR, IN THE CASE OF NATIONALLY FUNDED PROJECTS, TO THE CHIEF OF THE SPECIAL PROGRAMS BRANCH, DIVISION OF STUDENT SUPPORT AND SPECIAL PROGRAMS, BUREAU OF POSTSECONDARY EDUCATION, U.S. OFFICE OF EDUCATION, WASHINGTON, D.C. 20202.

SECTIONS A - D - SELF-EXPLANATORY

SECTION E - GRANT PERIOD: THE PERIOD, SPECIFIED IN THE NOTIFICATION OF GRANT AWARD, DURING WHICH COSTS MAY BE CHARGED AGAINST GRANT.

SECTION F - REPORT PERIODS AND DUE DATES:

REPORT PERIODS	DUE DATES
7/1/74 - 9/30/74	OCTOBER 15, 1974
10/1/74 - 12/31/74	JANUARY 15, 1975
1/1/75 - 3/31/75	APRIL 15, 1975
4/30/75 - 6/30/75	AUGUST 30, 1975

SECTION G - SELF-EXPLANATORY.

SECTION H - COST CATEGORIES: FEDERAL FUNDS INCLUDED IN EACH LINE ITEM MUST REFLECT ALL ITEMS APPROVED IN THE BUDGET.

IF "OTHER" COSTS, LINE 8, REPRESENT MORE THAN 5 PERCENT OF THE TOTAL DIRECT COSTS, ITEMIZE BY CATEGORY ANY COST OF MORE THAN $300.

COLUMN 1 - ENTER DOLLAR AMOUNTS AS APPROVED BY THE GRANT AWARD INSTRUMENT OR SUBSEQUENT GRANT AMENDMENTS.

COLUMN 2 - ENTER EXPENDITURES FOR THE QUARTERLY REPORT PERIOD AS GIVEN IN SECTION "F".

COLUMN 3 - ENTER CUMULATIVE EXPENDITURES FROM BEGINNING OF GRANT PERIOD TO END OF QUARTERLY REPORT BEING SUBMITTED.

COLUMN 4 - ENTER BALANCE OF APPROVED FUNDS NOT USED AS OF END OF REPORT PERIOD (COLUMN 1 MINUS COLUMN 3).

SECTION I - BUDGET CHANGES: EXPLAIN ON A SEPARATE SHEET ANY DIFFERENCES BETWEEN THE APPROVED BUDGET OR WORK PROGRAM AND THIS REPORT.

SECTION J AND K - SELF-EXPLANATORY.